2010 Tourism Plan

Responding to Challenging Market Conditions

NovaScotia.com

Shaped by the Sea

MESSAGE FROM THE MINISTER

Dear Tourism Partners,

Since taking on the role of Minister, I have enjoyed the opportunity to learn about the tourism industry and the possibilities to strengthen the contribution **you** make to Nova Scotia's visitor economy. I have been impressed by your perseverance and resilience in the face of this year's global tourism and economic challenges. Despite the challenges, the sector remains one of our province's significant revenue generators, and I would like to thank each of you for your hard work and contribution.

Conditions in 2010 are expected to be similar to 2009, and navigating these turbulent times will require us to be innovative, committed to high-quality experiences, and adaptable to evolving travel trends. Above all, we must keep our focus on the visitor and on providing a range of experiences and services that distinguish Nova Scotia as a premier travel destination.

It is more important than ever for government and industry to work together. To be successful, government and industry must continue to share information, ideas, solutions, and responsibility for growing tourism in Nova Scotia. In that vein, it is my pleasure to share these plans with you.

I encourage you to engage with the department, take advantage of the many partnership opportunities available, and share your ideas on how to increase the quality and competitiveness of the Nova Scotia experience.

Sincerely,

Minister, Tourism, Culture and Heritage

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EXECUTIVE SUMMARY

Adaptability is key during the current challenging economic period. As global conditions and trends shift, Nova Scotia's 2010 tourism plan seeks to respond by adapting to changes in the marketplace and in consumer habits. Doing so will help to ensure we continue to weather the current economic uncertainties.

The recession has affected all aspects of travel. Consumer confidence, business travel, and visits to the world's top tourism destinations have all decreased. Intense competition has caused operators worldwide to drop prices or add value to attract consumers. The result has been a new breed of value-conscious, bargain-hunting travellers. Many have chosen to forgo long-distance trips in favour of travel closer to home.

Despite these changes, in a global environment where "flat is the new up," Nova Scotia performed relatively well in 2009 compared with many other destinations. The overall number of visitors is projected to increase to 2,102,000, up 1 per cent from 2008. Canadian visitors, notably from other parts of Atlantic Canada and Ontario, increased, while visitors from the United States and overseas decreased. Air travel to Nova Scotia declined, a result of reduced business travel, while leisure air travel actually increased. Although visits were up slightly, revenue was $1.036 billion, a 1.6 per cent decrease over 2008, and room nights were down 5 per cent across the province. The decline was largely the result of the drop in business travel and fewer international visitors, who tend to stay longer and spend more than visitors from nearby markets.

Looking ahead to 2010, global economic recovery is expected to be slow, and the highly competitive environment is expected to persist. In short, 2010 is expected to look much like 2009. As such, our 2010 tourism plan will balance immediate opportunities with the core aspects of our long-term strategy.

We will devote significant attention to the Canadian market, our largest source of visitors, which has proven to be resilient in difficult economic times. We will target this market more aggressively with retail-oriented advertising that stimulates interest and allows operators to promote packages and offers directly to potential visitors. With an eye to long-term growth, we will continue our activity in key international markets, such as the mid-Atlantic regions of the United States and the United Kingdom.

In 2010, we will focus energy and resources on developing our core experiences. This will include the creation of Events Nova Scotia, an initiative of Nova Scotia Tourism, Culture and Heritage and the Atlantic Canada Opportunities Agency, to attract major, high-caliber events that will bring visitors and revenues to all regions of the province.

We will also launch a refreshed novascotia.com, with more compelling visuals and videos. The website will focus more on core experiences, packages, and itineraries to lure visitors, and we will continue to build our online presence through social media channels.

In times of fiscal restraint, it is more important than ever for government and industry partners to work together to share information and coordinate efforts to maximize resources. In 2010, we will enhance our ongoing engagement with a new industry website and e-newsletter, and we will work with key industry partners to solicit more structured input into tourism marketing and a refreshed long-term tourism strategy.

SITUATIONAL ANALYSIS - A CHALLENGING ENVIRONMENT

In 2009, the travel industry faced significant challenges globally, nationally and locally. While results varied, and some areas were better able to adapt than others, the trends were consistent.

Global Travel

Increasing competition

The global tourism environment is continually changing. Over the past two decades, deregulated air travel and the emergence of the Internet have opened up the world to travel. Places that few would have considered tourism destinations at one time, such as Vietnam and Croatia, are now competing for visitors. The result has been intense competition as a larger number of destinations vie for customers.

The resulting fragmentation of the travel market has made it more challenging for smaller destinations like Nova Scotia. The task at hand is to continuously work at making our products and experiences stand out amid aggressive competitors and seemingly unlimited consumer choices.

Changing consumers

Travellers have become more sophisticated over time – in their knowledge, in the experiences they desire, and in the way they plan and shop for those experiences. Technology has been the great enabler of this shift: anyone with Internet access now has information, pricing, and perhaps most importantly, consumer reviews at their fingertips.

Short-term impacts

In addition to "evolutionary" changes, the tourism industry faces the effects of more immediate events, such as 9/11, the SARS outbreak, and most recently the H1N1 virus. These events decrease travel in the short term, but demand generally rebounds. The desire to travel and explore new places, it would seem, is enduring.

International Travel Down in 2009

International tourist arrivals decreased in all major regions with the exception of Africa in 2009.

One of the many examples of the competitive deals offered in 2009.

Recessionary declines

In 2009, the global recession was on everyone's mind and resulted in declines in consumer confidence and in global travel. The United Nations World Tourism Organization forecast that international arrivals will decline by 5 per cent in 2009, the first decrease since 2003. In fact, the six most visited countries in the world – France, Spain, United States, China, Italy, and Britain – all recorded declines in visitation in the past year. Even popular online travel planning sites, such as Expedia, Travelocity, and TripAdvisor, reported traffic declines in the double digits.

With a slow economic recovery expected, new guiding values expected to emerge for consumers include a return to saving, shunning debt, and general avoidance of conspicuous consumption.

Hard-hit business travel

Business travel has been one of the biggest victims of the global recession. Tough economic times have forced businesses to tighten spending and shift thinking and behaviour away from face-to-face meetings toward greater use of technology. While business travel is expected to rebound somewhat, stricter spending policies may be left in place as decision-makers look carefully at return on investment. Many believe a fundamental shift has occurred, creating a "new normal" for business travel.

SITUATIONAL ANALYSIS - A CHALLENGING ENVIRONMENT

Global Travel

Increasing competition

Changing consumers

Short-term impacts

International Travel Down in 2009

Recessionary declines

Hard-hit business travel

Airline industry struggling

The recession and the corresponding decline in business travel and foreign vacation travel have had a significant impact on the airline industry. The International Air Transport Association estimates $11 billion in losses in 2009 due to decreased demand, deep cuts to air fares, and high fuel prices. The airline industry is not expected to recover until 2012, at the earliest. First-class fares are expected to increase as pent-up demand for business travel may coincide with reduced air capacity.

Value for money – A key theme in 2009

Airlines, hotel chains, and destination marketing organizations offered significant incentives to travellers to stimulate bookings. Destinations and hotels rarely thought of as "bargains", such as the Trump hotels in New York City and Las Vegas, were dropping prices dramatically in 2009. One example of creative packaging is the WestJet offer this past summer for round trip travel from Halifax to Las Vegas and three nights at the Bellagio hotel, priced at $576. As an example of the impact on an industry level, France slashed its value added tax for café and restaurant purchases to 6 per cent from 19 per cent, while its hotel and restaurant association agreed to lower prices by 12 per cent on basic menu items.

Clearly, for travel, it is now a buyer's market. The recession, combined with readily available travel deals and options, has ushered in an era of cautious spending and given rise to an increasingly value-conscious, bargain-hunting traveller.

A global 'staycation' phenomenon

Many travellers in 2009 adopted a "go big or stay home" mentality. Some took advantage of deals and low prices to travel to exotic, "must-see" destinations; others chose to stay closer to home. The "staycation" trend was evident globally this year.

Many countries posted increases in domestic travel and reductions in foreign visitors. In the United Kingdom, the word "paliday" was coined to describe a holiday during which domestic travellers stayed with friends or family. Visits by British residents abroad declined by 21 per cent in the first quarter of 2009, while visits to Britain by travellers from other countries declined by 3 per cent in the same period. In France, the world's top tourism destination, an increase in domestic travel offset a 14 per cent drop in the number of foreign visitors during July and August.

Canadian Context

Nationally, the economic recession had an impact on travel with overall international trips to Canada declining by 8 per cent over 2008 (to the end of August), and the declines came from all major markets.

Visits from the United States, Canada's largest international market, have been steadily decreasing, a trend that continued in 2009. Overnight visits by Americans to Canada declined to 13.4 million from 16.2 million between 2002 and 2007, according to Statistics Canada. In 2009 (to the end of August), visits by American travellers to Canada dropped by 7 per cent. The need for passports reduced travel to Canada from the United States for a short period.

Incentives and added-value offers

Within Canada, the tourism industry used incentives extensively to stimulate travel and to gain a competitive edge. The impact of these offers has been a reduction in average room rates and revenue per room available across the country.

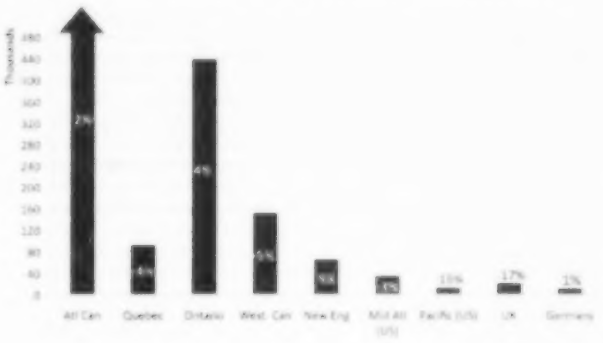
Nova Scotia Results

Nova Scotia has fared relatively well, despite the challenges. A year ago, given the outlook for 2009, we made a strategic decision to place greater emphasis on the domestic market while maintaining investment in long-haul markets with long-term growth potential. The strategy proved to be the right one.

Overall visits held steady

As of November 2009, the number of overnight non-resident visits to Nova Scotia is projected to increase by 1 per cent by year's end. Consistent with global trends, visits from domestic markets, particularly Atlantic Canada and Ontario, increased while visits from the United States and overseas decreased.

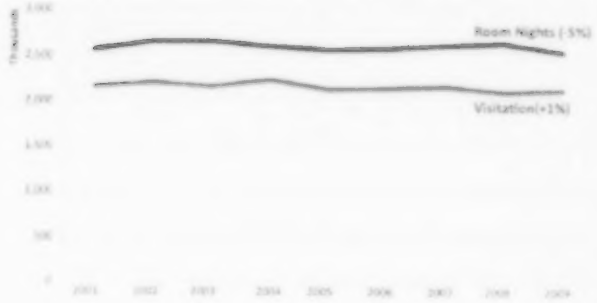
Closer Markets Performed Better
Arrivals in Nova Scotia, 2009 (Compared to 2008)



Road travel up, air down

Since 2002, there has been a general trend of increasing air travel and decreasing road travel to Nova Scotia. This trend was interrupted in 2009. Air travel to Nova Scotia, which accounts for about one-third of all visits, decreased by 13 per cent. Road visits increased by 8 per cent. We will be watching this closely to assess whether it is a short-term issue reflecting the economic situation and, in particular, reduced business travel.

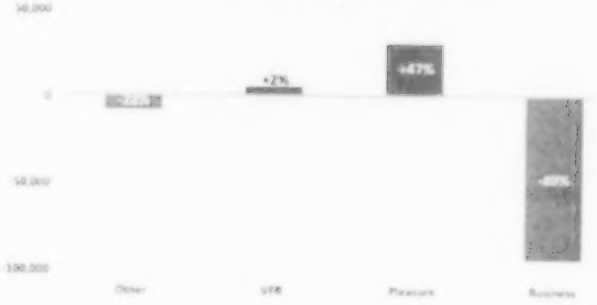
Visits Up, Room Nights Down
2009 (Projected) Visits and Room Nights



Travel by air – Leisure up, business down

Airport surveys indicate business travel by air decreased by 48 per cent in 2009. Statistics suggest the drop is largely the result of less corporate travel, more specifically government business travel as well as a decrease in meetings and convention business. At the same time, the airport surveys indicated leisure air travel increased by almost 50 per cent – demonstrating that air travel is still a popular mode of travel for leisure visitors.

Business Down, Pleasure Air Up
Change in Visits Compared to 2008



Fewer room nights sold

Despite a slight increase in visits, the number of room nights sold throughout Nova Scotia was down 5 per cent. Decreases, in every region, ranged from 1 to 7 per cent. Meanwhile, short-term campground site nights sold increased 2 per cent and total site nights increased by 1 per cent.

The decline in room nights sold is likely due to many factors, including the drop in business travel and fewer international visitors, who stay longer than domestic visitors. Other possible causes include more visitors staying with friends and relatives and more budget-conscious travellers.

Neighbouring provinces have seen similar declines in room nights sold from January through August 2009. Prince Edward Island and New Brunswick had declines of 4 per cent and 2 per cent respectively.

Average Daily Rates Decline
Per cent change (Jan-Sept)

Cruise still strong

In recent years, cruise has been a bright spot for Nova Scotia's tourism, and it continues to be strong. Almost 228,000 people visited Halifax on a cruise ship in 2009, on par with 2008, which was a record-breaking year. Another 76,400 passengers visited Sydney, a 19 per cent decrease from last year. Some of this decline was due to weather (almost 10,000 passengers were unable to dock due to high winds). Although passengers are not included in the overall visitor numbers as they do not stay overnight, they contribute significantly to local economies.

Revenues declined

Revenues for 2009 are estimated to be $1.300 billion, a 1.6 per cent decrease from 2008. The decline in revenues is due to decreased visitor spending, including a decrease in room nights sold.

Get the stats!

Follow Nova Scotia tourism statistics through the year at www.gov.ns.ca/tech/tourism/research.aspx. You can find monthly information about the number of visitors, occupancy rates, room nights sold throughout the province, and much more.

Airline industry struggling

The recession and the corresponding decrease in business travel and foreign vacations travel have had a significant impact on the airline industry. The International Air Transport Association estimates $11 billion in losses in 2009 due to decreased demand, deep cuts to air fares, and high fuel prices. The airline industry is not expected to recover until 2012, at the earliest. Fuel costs fares are expected to increase as pent-up demand for business travel may coincide with reduced air capacity.

Value for money – A key theme in 2009

Airlines, hotel chains, and destination marketing organizations offered significant incentives to travellers to stimulate bookings. Destinations and hotels, every thought of as "bargains", such as the Trump hotels in New York City and Las Vegas, were discounted prices dramatically in 2009. One example of creative packaging is the WestJet offer that got customers to travel non-stop from Halifax to Las Vegas and three nights at the Bellagio hotel priced at $976. At the opposite end of the spectrum on a luxury level, France slashed its value-added tax for cafe and restaurant purchases to 5 per cent from 19 per cent, while its hotel and restaurant association agreed to keep prices by 12 per cent on basic menu items.

Clearly, for travel, it is a buyer's market. The economic environment with readily available travel deals and options has ushered in an era of cautious spending and quest for better, increasingly value-oriented, travel experiences.

A global 'staycation' phenomenon

Many travellers in 2009 avoided a "big leap of faith" and instead eventually saved their vacation dollars and time to explore closer-to-home destinations. Many chose to stay closer to home. The "staycation" trend was evident globally throughout

Many tourism operators in destinations around the world, including Nova Scotia, saw increased interest from visitors who were looking for a "staycation" experience. The trend was supported by domestic travel data which showed a shift in domestic travel with the help of lower, more affordable resident airfares. Air travel by Canadians in the first quarter of 2009, when compared to the same period in 2008, declined by 4 per cent in the same period in France, the number of trips to destinations an increase in domestic travel of 2 to 14 per cent during the first half of 2009 (January to June) and August.

Canadian Context

Nationally, the economic recession had an impact on travel to and from Canada. International travel to Canada declined by 8 per cent in 2009 to the end of August, and the decline came from all major markets.

Visits from the United States, Canada's largest international market, have been steadily decreasing. A trend that continued in 2009. Overnight visits to Canada by Americans declined by 10.4 million from 16.2 million between 2008 and 2009, according to Statistics Canada. In 2009 to the end of August, visits by American travellers to Canada declined by 7 per cent. The need for passports reduced travel to Canada more than border visits for a short period.

Incentives and added-value offers

Airline Canada, the tourism industry and provinces are working to stimulate travel and to gain a competitive edge. The result of these offers has been a reduction in average travel costs and increase the depth available across the country.

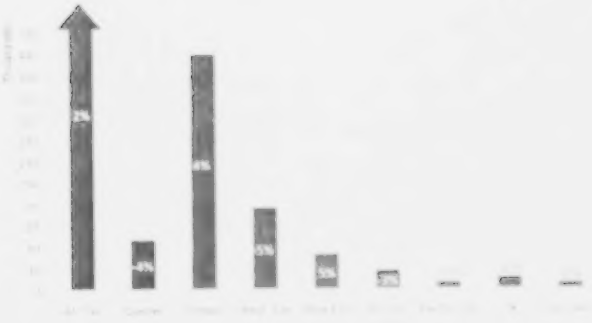
Nova Scotia Results

Nova Scotia has fared well during the recession. Although 2009 is not over the outlook for 2010 is positive. Nova Scotia is poised for growth as the economy recovers and airlines increase capacity. Nova Scotia is well positioned to meet consumer needs with their growth potential. The industry is poised to do the same.

Overall visits held steady

As of November 2009, the number of overnight visits to Nova Scotia is projected to remain at 7 million visits this year. Consistent with travel trends, Nova Scotia has seen declines in overnight visits from the United States and overseas markets.

Closer Markets Performed Better
Arrivals in Nova Scotia, 2009 (Compared to 2008)



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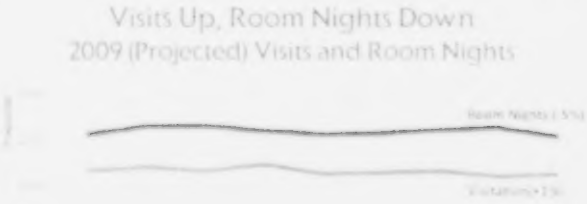

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Fewer room nights sold

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Industry Highlights

Despite the challenges on global, national and local levels, Nova Scotia's tourism industry had many successes to celebrate in 2009.

Major events continued to bring visitors from near and far. The Tall Ships Nova Scotia Festival '09 was named the top event of the year by the American Bus Association. Canoe '09, the 2009 ICF Canoe Sprint World Championships, was the largest international sporting event to be held in Atlantic Canada. Other major events included the 2009 Nautel Laser World Championships at St. Margarets Bay, the Flight of the Silver Dart Centenniel Celebration in Baddeck, and concerts featuring major performers, including Paul McCartney and KISS on the Halifax Common. Annual events such as the Stan Rogers Folk Festival and the Celtic Colours International Festival attracted a wide range of visitors. And already, for next year, the American Bus Association has identified the Canadian Navy's100th anniversary celebration as a top event.

Nova Scotia welcomed its two millionth cruise ship visitor since 1980 in August, on Holland America's Maasdam, reflecting the growth and importance of this segment of our tourism industry. Another significant event was October's inaugural service to the ports of Digby and Lunenburg by British-based Fred Olsen Cruise Line.

Nova Scotia destinations and experiences continue to draw international accolades. Travel + Leisure magazine named Cape Breton the Top Island in continental North America and Canada. Lonely Planet named the Cabot Trail one of world's top 10 cycle trips that every cyclist should make, describing Cape Breton as offering the "whole package" in terms of what visitors can experience while travelling the island. Highlands Links made Golf Magazine's top 100 courses in the world; one of only two Canadian courses on the list.

The Cabot Trail. One of the world's Top 10 cycle trips.

The Bay of Fundy became one of the 28 finalists – and the only Canadian entry – in the new 7 Natural Wonders of the World contest.

Trout Point Lodge was one of 10 finalists from more than 660 entries (from 81 countries) in the second annual "geotourism challenge" sponsored by the National Geographic Society and Ashoka's Changemakers. The competition identifies individuals and companies that have introduced the most innovative practices in geotourism. The Crown Jewel Resort made the National Geographic 2009 Stay List, with special mention going to another Cape Breton enterprise, Chanterelle Country Inn and Cottages.

Also this year, travel writer Sandra Phinney from Yarmouth won the Tourism Industry Association of Canada's Travel Media Award and Pacrim Hospitality Services Inc. won the Business of the Year (Multiple Units) Award.

In the culinary sector, Nova Scotia was awarded the inaugural 2010 Culinary Tourism Thought Leadership World Summit and Consumer Marketplace to be held in Halifax, September 2010. In addition, Nova Scotia wines received 28 awards at the 2009 All Canadian Wine Championships and the Tempest Restaurant in Wolfville was designated one of healthiest restaurants in Canada by Best Health Magazine.

Coco, the twittering dog. Chocolate Lake Best Western.

On the quality side, TIANS and the department worked with all accommodation sector organizations to develop and implement a new industry-led quality standards program. More than 249 industry professionals were certified through the Tourism Human Resource Council in 2009, bringing the Nova Scotia total to 2,438, the highest per capita in Canada.

Finally, many operators embraced the new frontier of social media in 2009, including Coco, the now-famous twittering dog from the Chocolate Lake Best Western.

These are just a few examples of the successes behind the numbers in 2009 for Nova Scotia's tourism industry. We look forward to many more in 2010.

KEY ISSUES FOR 2010 PLANNING

2010 – The Year of the Travel Deal
As the economy shows signs of recovering, the recession may have a lingering effect on consumer confidence and behaviour. The search for savings, bargains, and value will continue. Debt-averse consumers will likely continue to spend cautiously.

In the travel world, stiff competition will remain and possibly intensify. In fact, some travel media have dubbed 2010 "The Year of the Travel Deal". The trend of people travelling closer to home is expected to continue, while people with the desire and means for long-haul travel may take advantage of the deals to take their dream trip to an exotic location.

Value and experience are key
The focus on top-notch experiences is more important than ever. If a consumer is going to spend money to travel to a destination, the experience must be worth it. In this competitive environment, industry members must work together to creatively package experiences and develop value-added offers that will attract visitors.

Recent research conducted with the travel trade in the United States indicates that Nova Scotia needs more experiential and hands-on learning opportunities for visitors, and that Nova Scotia – indeed, Canada – is expensive relative to competing destinations in our key markets like the United Kingdom.

While decisions to lower room rates and prices in today's environment are the purview of individual operators, more can be done collectively to create compelling experiences and to facilitate the development and promotion of value-added packages. These will be among our priorities for the coming year.

Balancing short and long-term opportunities
The travel industry environment in 2010 is expected to be very similar to 2009. It will be important for Nova Scotia to continue to emphasize the domestic market, particularly Atlantic Canada and Ontario, which have proven to be more resilient in difficult economic conditions. The focus must, however, be balanced with the need to develop our more lucrative, long-haul markets, such as the mid-Atlantic U.S. and the United Kingdom, with potential for long-term growth and higher visitor spending yields.

More than ever, quality experiences and value will be critical to attracting visitors. Nova Scotia must be prepared for a value-conscious consumer. We must ensure that we offer authentic, quality experiences in which visitors can immerse themselves in the best of our local culture.

STRATEGIC DIRECTIONS FOR 2010

Based on the outlook for 2010 and what worked in 2009, we will continue to target nearby markets while maintaining investment in long-haul markets with potential for future growth. We will also increase our emphasis on developing and promoting compelling experiences and packages to stimulate consumer interest.

This plan will carry us through uncertain economic times as we work with our industry partners to refresh our long-term tourism strategy. Our 2010 priorities fall under four main areas: experience development, marketing, industry engagement, and research.

Developing the Nova Scotia Experience

Working with industry to developing authentic, sustainable, consumer-driven experiences

- Co-establish Events Nova Scotia and develop a major events-attraction strategy with the Atlantic Canada Opportunities Agency
- Develop an inventory of best experiences centred on Nova Scotia's core and niche strengths
- Identify local industry leaders in experience development and facilitate knowledge-sharing and mentoring with industry partners
- Identify gaps and create tools, including an "experience tool kit," to help industry partners develop compelling, brand-consistent experiences
- Deliver workshops on developing packaging and itineraries
- Enhance Nova Scotia's niche experiences by working with more partners through the Community Development Trust program

Marketing the Nova Scotia Experience

Marketing the right experience to the right audience through the right channels

- Focus on markets closer to home, particularly Atlantic Canada and Ontario, in the short-term while maintaining investment in markets with long-term growth potential
- Sharpen focus on core and niche experiences that are unique strengths and differentiators through advertising, web, and media
- Stimulate the consumer with more value offers by including price points and packages in advertising and online
- Launch refreshed novascotia.com, with more compelling visuals, better organized content, and a deeper focus on core and niche experiences
- Continue to build an active and engaged social media presence
- Build on the campaign using real Nova Scotian "heroes" to sell our core and niche experiences

Industry Engagement

Industry and government sharing information, ideas, solutions, and responsibility for growing tourism

- Launch new industry communications tools, including a new website and inTouch e-newsletter
- Develop an annual survey and report to industry to encourage greater input and accountability
- Develop a more structured mechanism for industry input into tourism marketing

Research

Gathering and sharing industry and consumer insights to inform better decision making

- Gather new baseline information through a 2010 visitor exit survey and share insights
- Complete the new Tourism Economic Impact Model and share with industry partners
- Investigate integration of the Canadian Tourism Commission's Explorer Quotient model into experience development and marketing

NOVA SCOTIA'S TOURISM STRATEGY

The Nova Scotia Brand

Our brand is our most important tourism asset because it is the perception that exists of us in the minds of a potential visitor. Branding is more than marketing; it is also what we do through product development and partnerships to influence how our brand is perceived.

"Nova Scotia is North America's original maritime culture where visitors will be captivated by our **old world charm** and **new world pulse**, which have been **shaped by the sea** and the **spirit of our people**."

Nova Scotia's tourism brand was developed in 2006 based on extensive consultation with industry partners and past and potential visitors.

Nova Scotia's tourism strategy is built upon three key areas:

Core experiences – Why our visitors travel here
Customer courtship – How we entice them to come here
Gateway – Where they come from and how they get here

Core experiences

Nova Scotia's tourism development and marketing are built around core experiences, within which are a variety of niche experiences. These core experiences represent areas where Nova Scotia has unique and authentic strengths that give us a competitive edge. They are areas in which we have a critical mass of experiences that respond to consumer demand and can motivate travel, and that have potential for growth.

Seacoast – coastal parks and beaches, coastal drives and trails, Cabot Trail, tides and Bay of Fundy, lighthouses, seaside communities

Outdoor – soft adventure activities, charter tours, nature

Culture – music, fine art and craft, founding cultures, festivals and events, way of life

Cuisine – Food (dining) and wine, agri-tourism

Heritage – UNESCO world heritage sites, built attractions, living traditions, genealogy, founding settlers

Urban – cities by the sea, Halifax, Sydney, unique towns, spas, shopping, weekend entertainment

Customer courtship

Our marketing strategy can be encapsulated in three simple words: lure, sample, buy. Through all forms of marketing communication – television, print and online advertising, public relations, editorial, social media and events – we "lure" potential visitors to novascotia.com. From there, they can "sample" our core experiences through engaging words, images, and video, or by chatting with an online travel counsellor. From novascotia.com, visitors can "buy" the product or be linked to operators to book their experience.

Gateway

Our gateway strategy helps define target markets and guides many of our strategic partnerships. In recent years, in light of the increase in air travel, we have focused on key cities with direct air access to Nova Scotia, such as Toronto, Ottawa, Boston, New York, Calgary and London. While overall air travel decreased in 2009, leisure air travel increased, validating our gateway strategy.

An important consideration of the gateway strategy is whether we continue to market in areas with limited air capacity. This was the case in 2009 with our overseas markets, such as the United Kingdom. By continuing to market, we risk generating demand which cannot immediately be serviced. However, it is that demand that will encourage airline operators to add additional routes and capacity. This is our longer term goal, and it is critical if we are to grow tourism from these markets in the future.

For air gateways, we often work through the Nova Scotia Passenger Air Gateway, a committee formed by Nova Scotia Tourism, Culture and Heritage, Atlantic Canada Opportunities Agency, Stanfield Halifax International Airport, Destination Halifax, Nova Scotia Business Inc., as well as partnerships with major air carriers such as Air Canada, United Airlines, and Icelandair.

We also support ferry, rail, and road links, through activities with partners such as Bay Ferries Ltd., Via Rail and others.

Target Visitor

The Cultural Enthusiast

Our target visitor has been defined by extensive and ongoing research into past and potential visitors. Generally, visitors to Nova Scotia like to immerse themselves in the culture of a destination and participate in authentic experiences that allow them to understand the way locals live. Using the Canadian Tourism Commission's Explorer Quotient model, these travellers have attitudes and expectations similar to the "cultural explorer" and the "authentic experiencer."

Demographically, our visitors tend to be couples over the age of 45 with above-average incomes and education. For marketing purposes, we focus on adults, age 40-64, with a bachelor or post-graduate degree and a household income of over $60,000.

Target Markets

Out of Province Visitors = Bulk of Revenue

The Canadian market

Atlantic Canada

Ontario

Quebec

Western Canada

The United States market

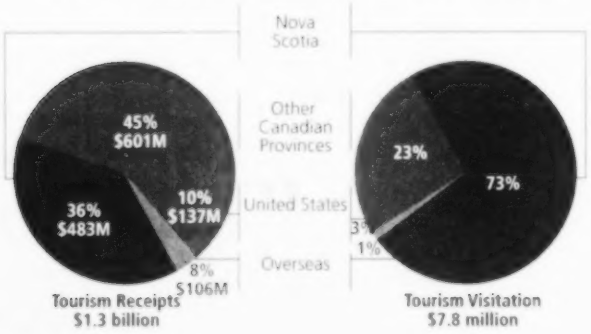
New England (Boston, Maine, and New Hampshire)

In the Atlantic Canadian market, our visitors tend to cross a broader demographic spectrum. They include a mix of couples and families, with a wide range of income and educational backgrounds.

Target Markets

Nova Scotia's marketing efforts are directed primarily at Canada, the United States, and the United Kingdom. While the volume of visitors is far higher from the Canadian market, the revenue per visitor from long-haul markets is higher as they tend to stay longer and spend more on shopping, experiences, hotels and restaurants.

Out of Province Visitors = Bulk of Revenue



Our activity in each target market varies depending on awareness levels, proximity and transportation access, media costs and budgets, and the availability of partnerships to leverage.

The Canadian market

The Canadian market comprises primarily visitors from Ontario and east of Ontario. The single largest market is Atlantic Canada, followed by Ontario, Western Canada and Quebec.

Atlantic Canada

Percentage of visitation: 53
Total number of visitors: 1,161,900
Average age of visitor: 35-44
Average visitor party spending: $560
Average length of stay: 4 nights

The Atlantic Canadian market has high awareness of Nova Scotia and most have visited previously. They are interested in getaways, family vacations, local festivals and events, and general "things to do".

Ontario

Percentage of visitation: 22
Total number of visitors: 437,800
Average age of visitor: 45-54
Average visitor party spending: $1,100
Average length of stay: 7.5 nights

The Ontario market is made up of couples over the age of 40 and families. They are primarily interested in exploring our local culture, history, cuisine, and outdoor experiences.

Quebec

Percentage of visitation: 5
Total number of visitors: 91,600
Average age of visitor: 45-54
Average visitor party spending: $1,100
Average length of stay: 7.5 nights

While their interests are generally consistent with the Ontario market, Quebec visitors tend to have a slightly higher interest in outdoor activities.

Western Canada

Percentage of visitation: 7
Total number of visitors: 151,500
Average age of visitor: 45-54
Average visitor party spending: $1,100
Average length of stay: 7.5 nights

These visitors also desire experiences ranging from immersion in our culture to outdoor activities and local cuisine.

The United States market

Percentage of visitation: 9
Total number of visitors: 186,600
Average age of visitor: 55-64
Average visitor party spending: $1,000-$1,500
Average length of stay: 6.5-8.5 nights

Visitors from the United States tend to be older couples. They are seeking cultural experiences, beautiful scenery, and the ability to relax and escape routine. Most U.S. residents vacation within their own country.

New England (Boston, Maine, and New Hampshire)

Percentage of visitation: 3
Total number of visitors: 64,700

New England is our largest U.S. market. Nova Scotia targets the New England market through a marketing partnership with Bay Ferries Ltd.

Mid-Atlantic (New York, New Jersey, and Pennsylvania)
Percentage of visitation: 2
Total number of visitors: 34,400

The mid-Atlantic is Nova Scotia's priority U.S. market under the Atlantic Canada Tourism Partnership agreement. Recent research of long-haul travellers in the mid-Atlantic market indicated that aided awareness of Nova Scotia in general was high at 83 per cent. When told of the benefits of a Nova Scotia vacation, 20 per cent said they would consider it in the future. Given the overall size of the market and the ease of access to Nova Scotia, the mid-Atlantic area holds good potential for growth.

Pacific (Los Angeles, San Francisco, and Oregon)
Percentage of visitation: 1
Total number of visitors: 12,200

The Pacific is a developmental market for Nova Scotia in partnership with the Atlantic Canada Tourism Partnership. Recent research of long-haul travellers in the Pacific market indicated that aided awareness of Nova Scotia in general was high at 81 per cent. When told of the benefits of a Nova Scotia vacation, 16 per cent said they would consider it in the future.

East North central (Chicago)
Percentage of visitation: 1
Total number of visitors: 16,300

The Nova Scotia Air Gateway committee identified Chicago as a market because of the direct flights, opportunity to grow leisure, business and meeting and convention business, and the links with Nova Scotia's product offering, including Celtic culture. The gateway committee leads marketing initiatives in the Chicago market.

The Overseas market

Percentage of visitation: 3-4
Total number of visitors: 68,500
Average age of visitor: 35-64
Average visitor party spending: $1,300
Average length of stay: 10.8 nights

The overseas market is comprised of primarily of the United Kingdom and German markets. Visitors tend to be middle-aged to older couples who are well educated and have higher incomes. These visitors are interested in outdoor and nature experiences, combined with experiencing our local lifestyle, unique culture, and cuisine. Awareness of Nova Scotia is low in these markets.

While Nova Scotia maintains some activity in Germany, the primary marketing effort overseas is devoted to the U.K. market, much of it through the Atlantic Canada Tourism Partnership.

United Kingdom
Percentage of visitation: 1
Total number of visitors: 20,000

The marketing effort is primarily directed at England, which accounts for 85 per cent of all visitors from the United Kingdom. The U.K. is Nova Scotia's priority overseas market under the Atlantic Canada Tourism Partnership Agreement. Recent research of U.K. long-haul travellers indicated that while 78 per cent of them are aware of Nova Scotia, few currently consider it as a vacation destination.

These visitors are mainly empty nester couples aged 45-55 and older, are well travelled, and have relatively higher levels of income and education. They enjoy beautiful, dramatic scenery, nature, and "soft" adventure. Their preference is to experience this in close proximity to cities and towns, where they can also enjoy quality seafood dining, unique accommodations, and nightlife and socializing with the locals.

Most prefer packaged holidays and booking through travel agents and tour operators. They generally conduct extensive online research on the destination in advance. Those interested in Atlantic Canada tend to be second- or third-time visitors to Canada.

Given the interests of U.K. travellers and the strengths of the Nova Scotia and Atlantic Canadian experience, there is strong potential for growth in this market.

Developing the Nova Scotia Experience

Working with industry to developing authentic, sustainable, consumer-driven experiences

Experience Development

Today's consumers want more than just a trip or a hotel stay – they want an experience. They want an experience they will remember and tell their friends and family about – an experience that engages the senses, connects them with our communities and cultures, and enriches lifelong learning.

Nova Scotia has an unparalleled mix of authentic experiences, spectacular natural beauty, and world-renowned culture and heritage that can set us apart in the minds of travellers. However, to be competitive in today's marketplace, we must ensure our offerings meet the changing needs of consumers.

In 2009, the Tourism Partnership Council completed a detailed exercise to identify the key barriers to growth for Nova Scotia's tourism industry. Although marketing continues to be important, the need for government and industry to work together to develop more sustainable, consumer-driven experiences emerged as a priority. This means developing our major assets and experiences to their full potential, ensuring that they are sustainable, and marketing them to the right audiences.

Build the Nova Scotia experience!

Watch for the new "Experience Nova Scotia Tool Kit" in spring 2010 and attend Product Development Day for hands on ideas to use the kit. Work with partners, including your Regional Tourism Industry Associations, to develop packages and itineraries for novascotia.com and other marketing vehicles.

The government works with industry partners and others to facilitate the development of our core and niche experiences through several program areas:

Industry development involves support for training and development opportunities including workshops and seminars, best-practice missions, resources, and how-to guides. It also includes support for a variety of programs, including career awareness, professional development, and service excellence training, through our funding for the Nova Scotia Tourism Human Resource Council.

Destination development involves working with tourism partners in specific geographical areas of the province to identify and develop their tourism assets. It includes activities such as the Tourism Development Area process, geographic and themed total market readiness, and the Tourism Development Investment funding program.

Sustainability involves working with a variety of partners to protect, preserve, and enhance our natural tourism assets such as our seacoast and nature, and green tourism initiatives. It also involves promoting the financial and cultural viability of tourism businesses.

In 2008, we introduced a new program under government's Community Development Trust Fund to assist in the development and marketing of Nova Scotia's unique products and experiences. The program provides $2.5 million over three years to develop a number of experiences in growing segments, such as culinary and wine, cultural, and genealogical tourism.

2010 Priorities

Building on the work of the Tourism Partnership Council, we will undertake an inventory of Nova Scotia's most compelling and sustainable experiences. We will identify gaps and opportunities for further development, as well as content for marketing channels.

We will inspire the development of new experiences and nurture innovation by identifying Nova Scotia leaders and helping them to share their knowledge with industry partners.

A new "experience tool kit" will assist industry in the development of compelling, consumer-driven experiences that are consistent with the Nova Scotia tourism brand. The tool kit will include information and ideas on topics such as targeting the experience seeker, positioning and promoting products as experiences, creating a green experience, and successful Nova Scotia best practices.

Our annual Product Development Day in April 2010 will focus on practical lessons to apply the Nova Scotia "experience tool kit" to create viable business opportunities.

Given the increasing importance of experiential packages and value-added deals, we will work with industry members to deliver individual business coaching and packaging workshops throughout Nova Scotia that will help to add to their bottom line. We will share costs with industry members to allow more to take part in programs such as those offered at the Gros Morne Institute for Sustainable Tourism, and we will deliver experiential tourism workshops throughout Nova Scotia.

We will assist in creating experienced-based programming for attractions, parks, and communities, through music, art, theatre, and storytelling.

We will also work with regional partners to develop compelling itineraries to provide "trip ideas" that encourage longer visits, and realign our funding programs to ensure the development of compelling experiences that support Nova Scotia's core and niche strengths.

Our core and niche experiences

Nova Scotia's core experiences are our competitive edge over other destinations. Within each, are a variety of niche experiences. Combined, they give us a critical mass of experiences that can lure travellers and provide significant potential for industry growth.

Seacoast

Nova Scotia's spectacular seacoast – more than 7,600 kilometres – is one of our core brand strengths and key differentiators.

In 2009, we worked with a number of stakeholders to preserve, protect, and enhance our seacoast experience. We took part in the development of the Provincial Oceans Network's *State of Nova Scotia's Coast* report. The first of its kind in Canada, the report is a snapshot of the current environment and starting point for a provincial strategy for coastal zone management.

2010 Priorities

We will continue to engage regularly with the Provincial Oceans Network on the *State of Nova Scotia's Coast* report to ensure a tourism perspective. The report will serve as a road map for public consultations to address the coastal issues that matter most to Nova Scotians.

We will work with industry on sustainable initiatives, including implementing the Nova Scotia Strategy for Sustainable Coastal Tourism Development. For visitors seeking seacoast activities, such as kayaking, we will work with partners to help ensure access to Nova Scotia's coastline and to provide better information on coastal activities via novascotia.com.

Outdoor

Nova Scotia's beautiful seacoast and natural heritage make it an ideal destination for outdoor and "soft" adventure enthusiasts. We work with a variety of stakeholders and operators to enhance the outdoor experience.

In 2009, we provided funding to the Nature Conservancy of Canada to develop new coastal hiking trails throughout the Brier Island Nature Preserve. The new trails allow visitor access while maintaining the preserve's ecosystems.

The world-famous Bay of Fundy provides a beautiful setting for an outdoor experience. With our funding to the Cumberland Regional Economic Development Association, the Eatonville Day Use Park at Cape Chignecto Provincial Park officially opened in July. The park has seven kilometers of new, accessible trails and seven platforms providing spectacular views of the Bay of Fundy.

Cape Chignecto Provincial Park, N.S.

We are developing a detailed Interpretive and Attraction Development Plan for the Bay of Fundy region. The plan will serve as a blueprint for development in the coming years for all stakeholders. We also increased funding to the Bay of Fundy Tourism Partnership to enhance promotion of the Bay of Fundy Recommended Experiences and introduce new businesses into the program.

2010 Priorities

For visitors powered by their passion for cycling or hiking and seeking an active vacation exploring our seacoast, we will review, enhance, and promote key routes and trails. We will work with other government departments and partners to develop and advance active transportation strategies, including cycling opportunities.

We will also work with organizations to enhance popular cycling destinations such as Cape Breton, by ensuring amenities including bike racks and signage are strategically located along routes. We will develop a new assessment tool to assist the market-readiness of Nova Scotia hiking and walking trails from a visitor's perspective. We will also add new information on hiking and biking to novascotia.com.

Culinary and wine

Cuisine is a hot trend and one of Nova Scotia's most popular and fastest growing tourism experiences.

With our abundance of fresh seafood, burgeoning agri-tourism industry, award-winning wineries, and quality dining, we are well positioned to become a leading gastronomical destination for "foodies" and wine enthusiasts seeking a cultured vacation and who place high value on quality, local food and drink.

In 2009, with funding through the Community Development Trust, we worked closely with Taste of Nova Scotia and other partners to develop Adventures in Taste. This series of easy-to-drive, self-guided culinary and wine tours throughout the province features extensive use of homegrown foods and ingredients and showcase Nova Scotia's unique culture, heritage, and lifestyle.

We also partnered with Taste of Nova Scotia and Saltscapes magazine to create a four-page supplement of 14 Adventures in Taste packages. These high-end packages included a culinary-related experience and overnight accommodation. More than 46,000 inserts were distributed in the fall issue of Saltscapes, at Celtic Fest Chicago in September, and through provincial visitor information centres.

Also working through Taste of Nova Scotia, we provided funding for new marketing materials to promote our culinary and wine experiences at shows and festivals, a best-practice mission to Pennsylvania for nine Nova Scotia wine producers, and a series of wine education seminars for restaurants around the province.

Adventures in TASTE
NOVA SCOTIA

2010 Priorities

We will continue working in partnership to further develop Adventures in Taste, including signage, promotion, and more packaged culinary experiences.

As part of our continuing "Heroes" marketing campaign, we created high-definition video and still images, including a television ad and web vignette featuring Nova Scotia chef Collin Stone.

In September 2010, Nova Scotia will host the Culinary Tourism Thought Leadership World Summit and Consumer Marketplace. We will capitalize on this unique opportunity to raise the profile of the province's culinary experience with international leaders and media.

Carve out your niche!

Work with partners in your community to develop a new culinary experience and join Adventures in Taste. Work with archives in your area to develop a genealogy travel package for Routes to Your Roots. Talk to us about your niche ideas!

Culture

A culture and a people that have been "shaped by the sea" make Nova Scotia a unique tourism destination. Visitors can experience first-hand the heritage and culture of the Mi'kmaw, Celtic/Gaelic, African Nova Scotian and Acadian people. Our art, music, dance, theatre, and storytelling allow visitors to experience a living culture that rivals some of the top destinations in the world.

Through financial and other supports, we are helping industry partners to develop innovative experiences for the cultural enthusiast through non-traditional partnerships, unique venues, and package and itinerary development.

Celtic/Gaelic culture

Nova Scotia is home to one of the few living Gaelic cultures outside of Scotland, setting us apart from other North American destinations. The old world has been shaped by the new on Cape Breton Island where Gaelic language, music, song, and dance are part of the cultural fabric and key to its identity, as well as an important niche for Nova Scotia's tourism industry.

In 2009, we partnered with the Celtic Heart of North America co-operative to target Celtic interest niche markets through web-based activity, including Facebook, blogs and advertising, and experience packages. The Celtic Heart of North America is a cooperative representing the Highland Village, Gaelic College of Celtic Arts and Crafts, Celtic Colours International Festival, Celtic Music Interpretive Centre, Glenora Distillery, Féis an Eilean, and the municipalities of Inverness and Victoria counties.

We also partnered with the Celtic Colours International Festival on a Celtic Colours Friendly branding and designation program for communities, audience research and development, and niche marketing.

2010 Priorities

We will continue to partner with the Celtic Heart of North America to develop and promote the Celtic experience.

As part of our continuing "Heroes" marketing campaign, we created new high-definition video and still image Celtic/Gaelic assets, including a television ad and web vignette. The spots feature Gaelic interpreter Joanne MacIntyre.

Acadian culture

Acadians and their descendents number three million worldwide today. More than 40,000 of them live in Nova Scotia, home of the first French colony in North America, where visitors can experience living Acadian culture.

In 2009, we provided funding for the Yarmouth and Acadian Shores Authentic Host Program to enhance the market readiness of the Acadian experience, as well as the Acadian Shores Interpretive Tour. We also funded Rendez-vous de la Baie, a new Acadian interpretive centre in Clare; Le Centre de la Mi-Carême in Cheticamp, a showcase of one of the oldest Acadian traditions; and new experiences at Grand Pré National Historic Site, including theatrical performances and Acadian picnics.

Acadian Interpretive Centre, Clare, N.S.

We also worked with partners to promote Nova Scotia's Acadian communities and experiences at the Congrès mondial acadien 2009 in Tracadie, N.B., as well as at IFTM Top Resa, an international travel trade show in Paris.

To better serve our francophone visitors, we worked with Acadian tourism stakeholders to identify operators offering French-language services and refreshed the Ici on parle français program, now known as Bienvenue.

2010 Priorities

We will provide funding to Le Conseil de développement économique de la Nouvelle-Écosse to create new Acadian experiences and add content to nouvelle-ecosse.com.

In April 2010, we will promote Nova Scotia as a destination to experience Acadian culture at the Salon vacances et loisirs d'été in Québec City.

We will implement the Bienvenue (formerly Ici on parle français) program with industry members and look into ways to reinforce the program's criteria and ensure visitors receive high-quality French-language service.

We will work with La Commission du tourisme acadien du Canada atlantique to further develop the Acadian cultural tourism experience in the province's Acadian product cluster areas, or Acadian destinations.

African Nova Scotian culture

African immigration to Nova Scotia began as early as the 1600s and continues today. The history of African Nova Scotians and their resilience as a people can be explored at several locations throughout the province and provides a potential new market for cultural enthusiasts and people exploring family history travel. In 2009, we added to our marketing assets by supporting video development to capture the performance of the Charles Town Maroon Drummers and Dancers.

2010 Priorities

We will work with the Black Business Initiative to further develop this market by engaging African Nova Scotian tourism partners in initiatives such as a best-practice mission, a Total Market Readiness program, and other opportunities.

In April, Nova Scotia will take part, for the first time, in the African American Travel Conference and Marketplace in Niagra Falls, New York. This association of 2,500 travel planners serves the African American community.

Mi'kmaw culture

The Mi'kmaq were here long before the first European settlers arrived on our shores. Today, visitors can experience authentic Mi'kmaw culture through dance, music, storytelling, art, and history throughout Nova Scotia.

In 2009, we partnered with the Mi'kmaq Association of Cultural Studies Tourism on a Total Market Readiness program to engage 10 Mi'kmaq tourism operators in visitor-based assessments, mentoring, and training opportunities.

We worked with the Confederacy of Mainland Mi'kmaq to support the next stage in the development of Mi'kmawey Debert, a centre that will tell the 11,000-year history of the people in this region.

We also partnered with the Acadia First Nation to create an interpretive plan for the Mersey River and provided funding and guidance to the Mi'kmaq Association of Cultural Studies to tell the stories of the Mi'kmaq at Nova Scotia's provincial parks through various means of interpretation.

2010 Priorities

We will continue to work with Mi'kmaq partners on the next phase of these projects and to identify new opportunities to develop and enhance the Mi'kmaq tourism experience.

Heritage

Genealogy / family history

Immigrants have been settling in Nova Scotia for hundreds of years. In addition to our native Mi'kmaq (or Mi'kmaw?) ancestry, Nova Scotia's founding cultures include Acadian, English, German, African Nova Scotian, Scottish, Irish and even Americans. In fact, 25 million people in North America can trace their families back to Nova Scotia. More than 1.5 million people passed through Halifax's Pier 21 from 1928 to 1971. As a result, Nova Scotia's genealogy is deep and diverse. This represents a large potential market for genealogical tourists – people who want to connect with their past, see where their ancestors lives, and experience their culture.

In 2009, we worked with the Council of Nova Scotia Archives to develop Routes to Your Roots, a soon-to-be-launched application on novascotia.com that will allow the user to research family names and develop related trip itineraries. Routes to Your Roots will connect 50,000 distinct surnames to 2,000 individual places using the market-ready resources of 18 archives across the province.

2010 Priorities

Routes to Your Roots will launch on novascotia.com in February 2010. We will continue to work with the Council of Nova Scotia Archives and other partners to promote genealogy and family history travel through niche market channels.

Other niche experiences

Within each of our core experiences, a number of niche experiences provide unique competitive strengths for Nova Scotia. Though the market may be relatively specific, these niches can be strong travel motivators for people with specific passions. A number of well-developed and promoted niche experiences can collectively have an impact on visitor numbers. Two such niches are motorcycle and aviation tourism.

Motorcycle tourism

Nova Scotia is well positioned for motorcycle tourism with its thousands of kilometres of scenic coastal drive and the growth in motorcycle ownership. In 2009, we supported partners, including Motorcycle Tour Guide of Nova Scotia and Cape Breton Bikefest, through funding, planning assistance, and literature distribution.These partners are working to make Nova Scotia a welcoming place for motorcycle visitors and helping to position us as a premier motorcycle touring destination. The support enabled them to host motorcycle events and rallies in the province and to promote Nova Scotia to motorcycle enthusiasts in key markets.

2010 Priorities

We will meet with motorcycle partners to identify opportunities to enhance collaboration and maximize resources by creating a more coordinated presence in the motorcycle market.

Aviation tourism

Nova Scotia is within two to five hours' flying time for people in major markets such as New York, New England, and Ontario, who own small aircraft. We offer a scenic aerial coastline, and aviation-themed experiences including the Nova Scotia International Air Show and a historical connection to early flight permanently interpreted at the Alexander Graham Bell National Historic Site in Baddeck. These clusters of experiences help to make Nova Scotia an appealing destination for a high-end market of aviation enthusiasts.

In 2009, we supported the Silver Dart Centennial Celebration, a year-long commemoration of flight that included a re-enactment of the first flight of the Silver Dart and the 100 Planes for 100 Years event.

2010 Priorities

We will work with aviation partners to conduct a feasibility assessment for aviation tourism to research competitors, market potential, and service and infrastructure needs. We will also add new aviation-related information on novascotia.com, including mapping of regional airports and scenic aerial waypoints.

Industry Training and Development

Government and industry have co-operated for years to create and enhance the Nova Scotia tourism experience. There are a number of programs, resources, and training opportunities available to industry to facilitate this process.
In 2009, through funding support to the Nova Scotia Tourism Human Resource Council, we continued to address industry's human resource needs. This includes career development, professional development, and service excellence programs, as well as addressing various labour market priorities.

More than 130 industry and community representatives attended Product Development Day with presenter Joe Veneto, "The Opportunity Guy," in April 2009. His interactive workshop provided participants with tools and techniques to develop compelling tourism packages. We also delivered two experiential workshops directly to industry focusing on cultural heritage, cuisine, and outdoor experiences.

More industry partners received support to attend experiential tourism workshops in the Gros Morne Institute for Sustainable Tourism's Edge of the Wedge program. Our total of "Edge" graduates now numbers more than 100. In addition, 12 industry members received support to participate in six best-practice missions offered by Tourism Atlantic. Topics included touring products, creative rural communities, experiential tourism, and major international festival and events. We also supported a partnership with the Atlantic Canada Opportunities Agency to host a living history best-practice mission to Trinity, N.L., with 12 industry members in attendance.

Deliver the best service!

Look into courses and programs offered through the Nova Scotia Tourism Human Resource Council. Sign up for a best practice mission and share the learning with tourism partners in your area. Attend Product Development Day or become an "Edge" graduate. If you offer French service, sign up for the Bienvenue program.

2010 Priorities

We will continue to work with the Nova Scotia Tourism Human Resource Council to identify labour market priorities.

We will also broaden industry knowledge through best-practice missions focused on coastal communities and cultural and experiential tourism. We will work with industry to implement and share learning after the missions.

Destination Development

In 2009, we built on the Tourism Destination Area process and suggestions from market-readiness assessments conducted by Destination Development Inc. by supporting initiatives such as signage and visitor kiosks throughout the Bluenose Coast and the Cabot Trail.

Destination Development Inc. also conducted two assessments in the Annapolis/Digby and Northumberland Shore regions in summer 2009, with more than 200 industry stakeholders turning out to hear results at "boot camps" in the fall.

More than 30 industry partners received funding to help create compelling core experiences through our Destination Development Program. Projects include the Brier Island Nature Preserve Coastal Trail Development, Shelburne Re-enactment Animation Project, and the Lounsbourg Beggar's Banquet.

2010 Priorities

Working with partners in the Annapolis/Digby and Northumberland Shore regions, we will advance suggestions made in the community assessment reports. We will also undertake assessments in two more areas of the province.

Are you market ready?

Check out our new on-line business market readiness tool kit at www.gov.ns.ca/tch/tourism.

Sustainability

By 2020, Nova Scotia aims to have one of the cleanest and most sustainable environments in the world and an economic performance that is equal to or above the Canadian average.

To ensure that tourism continues to be an economic driver in Nova Scotia for future generations, we have engaged with a number of provincial and federal stakeholders, such as the Provincial Oceans Network, to protect, preserve, and enhance our coastal assets. We are also engaged in the development of vital planning such as the provincial natural resources strategy, sustainable transportation strategy, and environmental assessment review process.

In 2009, we also worked with partners such as the Tourism Industry Association of Nova Scotia to update *A Question of Balance*, a self-audit workbook to assist operators with "greening" their business and increasing efficiency.

2010 Priorities

We will work with industry and government partners to increase capacity for sustainable tourism operations.

With partners across Atlantic Canada, we will also investigate potential for development of a sustainable "travel green" recognition program, allowing tourism businesses to evaluate their operations, set goals, and take actions toward environmental, social, and economic sustainability.

Festivals and Events

Nova Scotia has more than 600 festivals and events, among the highest per capita in the country. These festivals and events celebrate our unique culture and heritage, enrich the lives of Nova Scotians, and provide economic benefits to communities. They also strengthen Nova Scotia's core tourism experiences and reinforce our brand, provide ways for visitors to interact with our local culture and heritage, and, in some cases, can be important motivators for travel.

Sir Paul McCartney rocked the Halifax Commons in July 2009.

In 2009, we supported over 180 festivals and events throughout Nova Scotia such as the Wild Blueberry Harvest Festival, Pictou Lobster Festival, Antigonish Highland Games, and the Apple Blossom Festival, through the Festivals and Events Funding Program.

We provided support and guidance to the Nova Scotia Festivals and Events Council and worked with it to host the first Festivals and Events Day, a professional development seminar for the sector; 87 industry members attended. We also supported Nova Scotia festivals and events through novascotia.com, the Festivals and Events Guide, and the provincial tourism marketing campaign.

In July 2009, we worked closely with partners such as the Halifax Regional Municipality, Events Halifax, Destination Halifax, and others to bring major events like the Paul McCartney concert to Nova Scotia. More than 50,000 people, many from outside the province, attended the outdoor concert. Events of this magnitude, in addition to generating revenues and spinoff benefits, add to Nova Scotia's reputation as the entertainment capital of Atlantic Canada and a world-class destination.

2010 Priorities

In the 2009-10 budget, government announced funding for a new initiative to provide a coordinated approach to attracting more major events to Nova Scotia. Events Nova Scotia will receive a total of $600,000 in the first year from the Government of Nova Scotia and the Atlantic Canada Opportunities Agency. Its objective is to target and lure high-calibre events and build major events hosting experience in all regions of the province. Other partners include Trade Centre Ltd. and regional municipalities and development authorities.

We will also continue to market Nova Scotia's many festivals and events through provincial marketing platforms such as novascotia.com and host a second professional development session for festival and event planners in the spring of 2010.

MARKETING THE NOVA SCOTIA EXPERIENCE

Marketing the right experience to the right audience through the right channels

We use consumer research and insights to match the right Nova Scotia products and experiences with the right audiences. This includes developing marketing assets – including photography, video, and other content for our marketing campaigns and platforms – that reflect our core and niche experiences.

Our marketing operates on a simple lure-sample-buy model. We "lure" potential visitors with campaigns that appeal to their passions, encourage them to "sample" Nova Scotia through our website, events and other tactics, and then enable them to "buy" the specific product or experience, either on novascotia.com, through Check In, or through an operator.

The travel planning process has become less linear over time, with multiple information sources forming a complex web that ultimately leads to a converted customer.

Potential visitors seldom make a decision to visit a destination on the basis of a single ad or campaign. Nova Scotia's integrated tourism marketing plan is designed to reach them through a multitude of channels over time. This includes channels to consumers directly – for example, television, newspaper, magazine, online, and other advertising – and through travel influencers such as travel writers, tour operators, and travel agents.

It may take years between the first time travellers hear about Nova Scotia through a magazine article or friend to the time they actually visit. Throughout the entire travel planning cycle, we have many opportunities to influence and engage with the potential visitor. Once they are here, we have many additional opportunities to enhance their visit and to encourage them to share information about their vacation. This increases the chances of turning them into repeat visitors and ambassadors for Nova Scotia.

2010 Priorities

Our marketing is built around the Nova Scotia brand and core experiences. We will continue to highlight the "spirit of our people" by using real Nova Scotians to tell the stories of our unique and compelling experiences.

We will also bring greater focus to our core and niche experiences through our campaign and novascotia.com, enabling visitors to easily find information – video, blogs, packages and deals – on the experience they are seeking, and to plan and book the experience online.

Advertising

While the popularity of online and social media is increasing, traditional media (television, magazines, newspaper) remain critical for building the brand awareness required to entice potential customers to seek more information online. Nova Scotia uses a mix of advertising vehicles to reach potential visitors in our target markets.

Get advertising!

Place your product or experience in-market alongside the Nova Scotia brand. Purchase an ad in our advertising inserts that will be carried in the Globe and Mail, Toronto Star, Ottawa Citizen and regional daily newspapers. Watch the new inTouch e-newsletter for details.

International campaigns

Internationally, Nova Scotia advertises in market with a variety of partners, including the Canadian Tourism Commission, Atlantic Canada Tourism Partnership, Bay Ferries Ltd., and the Nova Scotia Passenger Air Gateway committee.

United Kingdom

In 2009, we partnered with the Canadian Tourism Commission and Atlantic Canada Tourism Partnership to advertise in newspapers, outdoor and online media in the U.K., including ads in the London Underground. The campaign, which ran in the spring, was complemented by travel trade and travel media activity throughout the year.

With our partners in the Nova Scotia Passenger Air Gateway committee, we ran a 13-week campaign with a popular radio station in London, including contests and a microsite, over the spring and fall of 2009.

United States

Nova Scotia, through the Atlantic Canada Tourism Partnership, ran campaigns in the mid-Atlantic and New England markets in 2009. The ad campaign included a mix of newspaper, magazine and online advertising, complemented by travel trade and travel media activity. This included campaigns with the New York Times and Boston Globe in conjunction with Bay Ferries Ltd.

Highlights from ad campaign

New York Times: 56% recall of ad, 61% took action – most common were visiting website (17%) and developing favourable opinion (17%).

Boston Globe ad in conjunction with Bay Ferries Ltd.

Through the Nova Scotia Passenger Air Gateway committee, we also ran a campaign in Chicago in the spring and fall of 2009 including television advertising, Comcast Video on Demand, and Comcast.net in Chicago.

2010 Priorities

We will continue to work through our existing partners to implement advertising campaigns in the U.K. and U.S. markets.

Canada-wide campaign

In 2009, for the first time, we featured real Nova Scotians in our national television and print advertising campaign. These "heroes," ranging from a skateboarding 75th Highlander on Halifax's Citadel Hill to a lobster fisherman from Advocate Harbour, highlighted unique Nova Scotian experiences while conveying the warmth and friendliness of our people.

Nationally, we ran five 30-second television ads on specialty television channels such as Slice, Food Network, and HGTV. They were complemented by magazine advertising in titles such as Zoomer, enRoute, and Homemakers, newspaper advertising in key gateway cities, including the Globe and Mail, Ottawa Citizen, Montreal La Presse, and Calgary Herald, as well as a variety of online sites.

The national effort featured an intensive four-week campaign in Ottawa in May, including TV, newspaper, outdoor, online, and contests. Research showed Ottawa residents found the campaign appealing and attention getting. Awareness increased by 27 points after the campaign.

Regional campaign

In the Maritime region, the Discover a Nova Scotia Favourite campaign featured twelve, 15-second ads and 28 closed-captioning spots and ran from May to October. Since Maritimers have a high awareness of Nova Scotia, the campaign was designed to highlight festivals, events, and "things to do" to stimulate immediate travel. Television was complemented by advertising in all regional daily newspapers and online. In addition, calendars and newspaper inserts provided getaway messaging and an opportunity for Nova Scotia operators to highlight their products and experiences.

Regional print ad

2010 Priorities

Nova Scotia will build on the success of the Heroes campaign with new people and experiences. We will run a single campaign across Canada to reduce production costs and maximize the media buy. The new ads will focus on cuisine, featuring chef Collin Stone, and Gaelic/Celtic culture, with Gaelic interpreter Joanne MacIntyre.

Given the focus on value and packaging in 2010, national advertising, while still focused on building brand awareness, will be more retail-oriented. Advertising inserts, carrying Nova Scotia operator products and experiences, will be distributed through the Globe and Mail, the Toronto Star, Ottawa Citizen and Maritime newspapers.

Online

The online world is rapidly evolving. Websites, previously passive read-only extensions of corporate literature, have become critical marketing tools in an increasingly networked world. Nova Scotia's tourism marketing is evolving to maximize web opportunities and to fully integrate our online presence with all other elements of our campaign.

Novascotia.com is being refreshed to become more vibrant, user-friendly, and interactive. We are dedicating a greater portion of our marketing budget to online activities and ensuring that our site is fully optimized so that we can continue to rank high in popular search engines like Google, Yahoo and Bing. And we have launched into social media, creating a branded and interactive presence on major social networks, such as Facebook, Twitter, and Flickr, and engaging with potential visitors through blogs and travel review sites like TripAdvisor. By comparison industry travel sites such as Expedia and Travelocity were down by double digits.

Novascotia.com

Novascotia.com is our primary marketing tool and call to action for all of our campaigns. The site receives more than 1.5 million visits annually.

In 2009, visits to novascotia.com decreased by 5 per cent, due in part to the growing number of online options for consumers. The number of online travel agencies has increased, and more and more operators have robust websites with online booking capability.

As Internet use changes, we look not only at the number of visitors to novascotia.com, but the quality of the visits, e.g., the number of pages viewed, the time spent on the site, the type of content visitors are engaging with, and click-throughs or "leads" to operator websites.

Refreshed novascotia.com homepage

Novascotia.com, January–October 2009 (change from 2008)

Number of unique visits: 1.4 million (-5%)

Direct traffic to novascotia.com: 392,000 (+28%)

Average time on site: 5 minutes (no change)

Average page views: 7 pages per visit (no change)

Click-throughs to operator sites: 589,200 (-25%)

Most visited pages: Home, Accommodations, Maps, Attractions, Festival & Events, About NS, Travel Guide, Regions, What to Do

Top 5 visits from: Halifax, Ottawa, Calgary, New York, Massachusetts

2010 Priorities

We view novascotia.com as our own media channel where we can lure potential visitors deeper into the Nova Scotia experience. In February 2010, we'll launch a refreshed website with beautiful imagery, engaging video, relevant user-generated content, and compelling packages and deals for purchase. The website will be fully integrated with our advertising campaigns. Content – from corporate content to user-generated videos and blogs – will be better aligned with our core experiences. The home page will be re-designed to better promote seasonal features, packages, and deals.

A new trip planner will enable users to select items of interest, such as accommodations, events, or packages, and add them to an itinerary. They can then organize their selections into a day schedule, view locations, drive distances and travel times on Google maps, and store the itinerary for future reference.

For Nova Scotia's tourism operators, novascotia.com provides an easy and inexpensive way to put their products and experiences in front of potential visitors from around the world. Many operators do not take full advantage of paid and free opportunities on novascotia.com. In 2010, we will streamline the offer. Packages, deals, and enhanced listing features such as video and itineraries, will be offered to operators at no cost.

Advertising on novascotia.com, 2009

Tier 3 package ($599): 11 purchased

Banner/text ads: 4 purchased

Packages: 3 purchased

Currently 95 packages are on novascotia.com. Most of these were added value for purchasing a newspaper/calendar feature ad.

The most popular package on novascotia.com received 14,300 click-throughs.

Maximize your novascotia.com listing!

Build your novascotia.com presence with up to seven photos and captions, video, and sample itineraries. Submit your packages and deals. Purchase online banner or text ads.

Online advertising

As part of the advertising mix, Nova Scotia buys space on a number of high-profile online properties such as Lonely Planet, TripAdvisor and Toronto Star.

Most tourism marketers see a strong return on investment for online advertising and are increasing investments. Nova Scotia has had strong results from our online advertising program and continues to shift appropriate resources to the online channel. The benefit of online advertising goes beyond click-throughs. Research indicates online ads can have the same effect as other types of display advertising, such as magazine or newspaper, in raising awareness, and that customers exposed to online advertising are more likely to search for brand terms.

Nova Scotia online advertising, 2009

Average click-through rate (CTR): 0.15%
Industry average CTR: 0.08%
Most popular online ad: Skyline Trail image

2010 Priorities

Nova Scotia's online advertising is most effective when placed in the context of travel planning sites or content, or alongside relevant core experience content. For example, users click an ad with a hiking image more frequently if it is placed with online hiking or outdoor content. We will continue with strategic ad placement and make greater use of visually appealing rich media ads to capture attention and build brand awareness. We will also use online advertising to draw consumers to packages and deals on novascotia.com.

Search Engine Optimization (SEO) and Search Engine Marketing (SEM)

Increasingly, people are using search engines such as Google and Yahoo to find information and websites rather than visiting a website directly by using the URL. More than 40 per cent of traffic to novascotia.com now comes from Google alone, and that amount is growing.

Nova Scotia continually optimizes our website for over 200 keywords, including general terms such as travel Nova Scotia, Nova Scotia vacation, Doers' & Dreamers' Guide, Nova Scotia events, and Cape Breton, as well as words related to our core and niche experiences, such as Nova Scotia food & wine and Acadian family tree. We even include common misspellings such as "novia scotia."

Search engine referrals, 2009

Top referring search engine to novascotia.com: Google, 41% Top 10 keywords: Nova Scotia, Nova Scotia Tourism, Tourism Nova Scotia, Cabot Trail, nouvelle ecosse, nouvelle écosse, Distance Calculator, Nova Scotia Canada, Google Earth, Novascotia.com

Our search engine marketing, or paid search, efforts continue to yield positive results. In 2009, the program has brought 35,000 clicks, at an average cost per click of $0.52, to novascotia.com, an improvement of $0.36 from 2008. Purchased words included Nova Scotia tourism, travel to Nova Scotia, and Nova Scotia weather.

2010 Priorities

We will continue to ensure that our website is rich in the keywords that reflect our core and niche experiences and match our potential visitors' passions, so we can rank high in Internet searches.

We will also optimize our accommodations and attractions listings pages on novascotia.com. As a result, search engines will "crawl" over 2,000 more pages on novascotia.com. This will greatly enhance the rankings of popular terms such as Nova Scotia hotels, Nova Scotia bed & breakfast, Nova Scotia museums, Nova Scotia whale watching, and more, and as well as the search rankings of many individual operators.

We will also continue to participate in social media, which improves search rankings, and to issue monthly "optimized" news releases on our core and niche experiences to online media.

Email program

Once we lure visitors to novascotia.com, we want to build a relationship with them. In 2009, we began to rebuild our relationship marketing database so we can provide engaged visitors to novascotia.com with relevant information and offers. We built the database to 15,000 engaged potential visitors over three months through the use of fun, interactive promotional tactics.

One popular campaign offered a free five-foot inflatable "Lola" or "Larry" lobsters to the first 100 people to enter an email contest. The campaign drew hundreds of emails per day and resulted in novascotia.com-branded lobsters touring the world from Music Nova Scotia Week in Yarmouth to the End of the Road music festival in the United Kingdom. Many winners continued to interact with us, posting pictures of them enjoying their lobsters on our Facebook fan page.

"Lola. At the End of the Road music festival in Dorset, U.K. Last seen being bounced up in the air by the crowd watching the headliners Explosions in the Sky. Whereabouts are now unknown."

2010 Priorities

We will continue to build the relationship marketing database and provide highly engaged users with relevant information, fun promotions, packages, and deals. Email continues to be a cost-effective, trackable means of encouraging new and repeat visitation from our Nova Scotia fans.

Social media

Your brand isn't what you say about yourself; it's what others say about you.

With the number of social networks doubling every year, that statement has never been more relevant. It is easier than ever for people to share photos, videos, information, and reviews about their travel experiences, and for people to find them. Suddenly, there are millions of brand ambassadors – or detractors – who are influencing travel choices. Considering that users trust other users more than corporate brands, the importance of social media in travel planning and marketing will continue to grow.

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Nova Scotia continually optimizes our website for over 200 keywords, including general terms such as travel Nova Scotia, Nova Scotia vacation, Doers' & Dreamers' Guide, Nova Scotia events, and Cape Breton, as well as words related to our core and niche experiences, such as Nova Scotia food & wine and Acadian family tree. We even include common misspellings such as "novia scotia."

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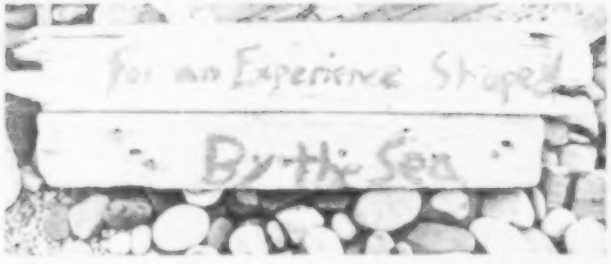
Our search engine marketing, or paid search, efforts continue to yield excellent results. In 2009, the program has brought 35,800 visits at an average cost per click of $0.52, to novascotia.com, an improvement of $0.36 from 2008. Purchased terms included Nova Scotia, Cabot Trail, travel to Nova Scotia, and Nova Scotia Weather.

2010 Priorities

We will continue to ensure that our website is rich in the keywords that reflect our core and niche experiences, and match our potential visitors' interests, so we can rank high in Internet searches.

We will also optimize our account relationship and effectiveness to further engage novascotia.com. As a result, we will increase our visits from 2,000 more markets in search engines. This will also help to improve the rankings of natural search terms such as Nova Scotia hotels, Nova Scotia bed & breakfast, Nova Scotia vacations, Nova Scotia whale watching, and many more as well as the overall keywords of many individual operators.

We will continue to participate in social media, which includes search marketing, and to make monthly "optimizing" visits to ensure we are capitalizing on opportunities to reduce media



Email program

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One popular campaign offered a free lighthouse inflatable "Lola or "Larry," lobsters to the Lost Trail people to enter an email contest. The campaign drew hundreds of emails per day and resulted in novascotia.com-branded lobsters touring the world from Music Nova Scotia Week in Yarmouth to the End of the Road music festival in the United Kingdom. Many winners continued to interact with us, posting pictures of them enjoying their lobsters on our Facebook fan page.

Lola *At the End of the Road* (2009, Norfolk, England, U.K.) *Lola was being prepared as a surprise for the festival's organizer but unfortunately she flew away. After much searching...*

2010 Priorities

We will continue to grow the opt-in email marketing database and provide highly engaged users with relevant information, fun promotions, packages, and deals. Email continues to be a cost effective, trackable way to excite and engage new and repeat visitation from our Nova Scotia fans.

Social media

Your brand isn't what you say about yourself, it's what others say about you.

With the explosion of social networks launching every year, that statement has never been more relevant. It is easier than ever for people to share photos, videos, information, and reviews about their travel experiences, and for people to find them. Suddenly, there are millions of brand ambassadors – or detractors – who are influencing travel decisions. Considering that users trust other users more than corporate brands, the importance of social media in travel planning and marketing will continue to grow.

Branded Twitter page

In 2009, Nova Scotia built a comprehensive social media program to complement ongoing marketing activities. We established a branded presence on Facebook, Twitter, Flickr, and YouTube, and are using contests and relationship building to expand our base of fans, followers, and subscribers. Through these sites, we are engaging people with a special interest in Nova Scotia's unique experiences and sharing timely information about festivals, events, contests, and special deals. We are also monitoring the daily online conversation using a tool called Radian6 and engaging in online conversations where we can provide assistance.

This includes everything from specially trained travel counsellors interacting on TripAdvisor to commenting on blogs or photos and inviting the owner to share them with our Nova Scotia networks.

Since our social media program began in summer 2009, online conversation about Nova Scotia has increased by 90 per cent. Daily monitoring shows that these messages, blog posts, tweets, photos, and videos reinforce our brand messaging and core experiences. More importantly, most come from unbiased third-party sources. While some of this increase has resulted from overall growth in social media, much is due to our focused social media activity.

Get in the conversation!

Follow us on our social media networks and participate in the conversation. Become a blogger on novascotia.com. Attend one of our training sessions and build your own social media strategy. Or submit packages for prizes through our social media programs.

In July 2009, we launched an iLOVE Nova Scotia contest inviting people to send a video showing us why they love Nova Scotia for a chance to win a $15,000 Nova Scotia dream vacation. More than 50 hopefuls submitted a rich variety of videos and promoted their entry through their own social networks, spreading the word about Nova Scotia.

iLOVE **Nova Scotia**

The winner, selected by online voting, is from Germany and we will work with him to make his vacation unique and memorable so that he may share it with friends, family, and followers back home. The contest drew 190,800 page views on novascotia.com, with more than half viewing other pages on the site. It also provided us with a wealth of user-generated video, as well as important learning about online voting for future contests.

We also ran social media contests to promote the Paul McCartney concert in July 2009, including Here Comes the Sun on Facebook and Tweetlemania on Twitter, which helped to build our follower base and generate online buzz about Nova Scotia.

In August, we launched a blogger platform on novascotia.com beginning with five bloggers. Since then, the blogs have had more than 92,000 views and are helping to enrich our online content and improve search engine rankings.

Also in 2009, we saw a wide variety of savvy Nova Scotia tourism operators using social media. To help operators navigate the world of social media, we held eight training sessions attended by almost 200 industry members from throughout the province. Feedback from the sessions was positive; social media was evidently an area of industry interest.

Social media by the numbers

Facebook:	1,500 fans (400 new members a month)
Twitter:	967 followers (180 new followers a month)
Flickr:	123 (20-30 new members each month); 1,136 photos
YouTube:	82 subscribers, 68 videos uploaded, 98,500 video views, 5,400 channel views
Blogger Platform:	5 active bloggers; 19,300 unique visitors in 3 months (about 60-80 visits a day), 92,200 page views
TripAdvisor:	6 agents trained, 240 posts since beginning in May

In addition to helping us generate online conversation about Nova Scotia, social media sites continue to grow as referral sources for novascotia.com. For example, while referrals from the top referring website, gov.ns.ca, decreased by 49 per cent, Facebook referrals increased by 579 per cent.

2010 Priorities

We will continue to build on the social media platforms through contests and relationship building. We will also dedicate a travel counsellor for the TripAdvisor program and offer more industry social media training sessions for both beginner and advanced users.

Accommodations and attractions operators on novascotia.com will be able to enrich their listing with the option to import TripAdvisor reviews into their listing. We are also exploring adding a social application to the new trip planner on novascotia.com that will enable users to share and rate their itineraries with other users.

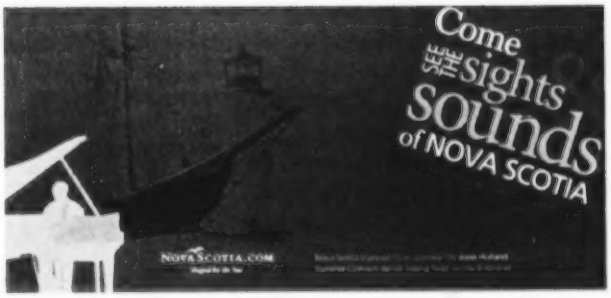
We will build our blogger platform by recruiting additional bloggers with a passion for our core and niche experiences and promote the blogs more widely. We will promote packages and special deals submitted by operators through our Facebook and Twitter networks.

Consumer Events / Public Relations

Consumer events are an important part of the marketing mix because they allow potential visitors to see, feel, touch, and taste the Nova Scotia brand. In addition to the face-to-face interaction with consumers, events have the added benefit of providing a platform to generate media exposure in our key markets.

In 2009, Nova Scotia held three major consumer events. To build awareness in the vast and growing United Kingdom market, we hosted a major promotion with a popular outdoor concert series with well-known U.K. entertainer Jools Holland from June to August. More than 32,000 residents, well matched with our target market, attended the eight concerts in major cities.

Nova Scotia musicians including Jimmy Rankin, David Myles, and Meaghan Smith performed at the events, while concert goers had an opportunity to learn more about Nova Scotia at a busy visitor servicing tent and enter a contest to win a vacation for two to Nova Scotia. About 5,900 people, or 17 per cent of attendees, entered the contest and requested follow-up information about Nova Scotia.



Jools Holland concert, United Kingdom

Quote from travel trade operator at Jools Holland concert event:

"We just need to find the time to get to Nova Scotia now! I feel sure that this will also be the response of many who now know about Nova Scotia as a tourist destination as a result of the whole promotion."
Simon Wrench, Inn Travel.

Media interviews with our entertainers on BBC Radio and other outlets earned more than £178,000 (C$313,000) in publicity value and conveyed the benefits and ease of a Nova Scotia holiday to the British audience. At the final two concerts, we held industry luncheons in partnership with Destination Halifax and the Halifax Stanfield International Airport. More than 100 guests representing tour operators, airlines, travel media, and the music industry attended the luncheons.

In March 2009, Nova Scotia hosted a major promotion with the Tim Hortons Brier in Calgary. The event was aimed at increasing awareness in the growing Alberta market in advance of the Halifax 2010 Brier. Brier-goers were treated to Nova Scotia kitchen parties, including a "ceilidh morning commute" on Calgary's Light Rail Train, and visitor servicing onsite. The promotion also included a "Brier to Brier" media promotion with CTV in which viewers could win a trip to Brier Island. The media campaign generated more than 1 million media impressions through television, newspaper, and radio coverage.

Nova Scotia, in partnership with the Nova Scotia Passenger Air Gateway Committee, was also the presenting sponsor at Celtic Fest Chicago in September. The two-day event attracted more than 150,000 people with an interest in Celtic music and culture. Nova Scotia provided visitor servicing at the event as well as a reception for media, tour operators and travel agents.

2010 Priorities

Nova Scotia is collaborating with its regional neighbours and the Atlantic Canada Opportunities Agency to host Atlantic Canada House at the 2010 Olympic Winter Games in Vancouver. Atlantic Canada House will showcase the region's offerings, including musicians, artists, and performers. We are also playing a key role hosting Nova Scotia Day at the Olympics on February 16.

In addition, the Canadian Tourism Commission has developed programming to capitalize on the Vancouver Olympics to raise awareness of all regions of Canada. Nova Scotia is partnering with the Commission to develop marketing assets, including high-definition footage, photographs and vignettes. These assets will be shared through social media channels and with the hundreds of international media who are looking for story content before, during, and after the Olympics.

In March 2010, Nova Scotia will host the 22nd annual East Coast Music Awards in Sydney. The awards will provide an opportunity to raise awareness in the region and nationally.

Through the Atlantic Canada Tourism Partnership, Nova Scotia has engaged public relations firms in the mid-Atlantic, Pacific, and the U.K. markets. They are planning a number of events in these markets, such as a "Shuck, Flex and Sip" event for media focusing on Atlantic Canadian cuisine at Flex Mussels Bar in New York City in March.

Consumer Shows

Consumer shows provide an opportunity to interact with and gather information and insights from potential visitors. Nova Scotia attends a number of consumer shows, many with industry partners, in our key markets.

The largest presence was at the Saltscapes Expo in Halifax in April. More than 85 Nova Scotia tourism operators and major partners, including the Nova Scotia Museum, Nova Scotia Public Archives, and regional tourism industry associations, promoted their products and experiences under the Nova Scotia brand. The show provided them an opportunity to reach the large regional market and also to promote "staycations" to Nova Scotians attending the show. It served as the launch of our regional advertising campaign. Almost 20,000 consumers came through the show in 2009, a 35 per cent increase over 2008.

Saltscapes Expo, 2009

Other consumer shows that Nova Scotia attended or was represented at in 2009 include:

Toronto Motorcycle Show
Atlantic Motorcycle Show
Montreal Travel and Golf Show
Ottawa Golf and Travel Show
Toronto Golf and Travel show
Ottawa Travel and Vacation Show
Calgary Outdoor Adventure Show
Toronto Travel and Leisure Show
AAA Travel Marketplace (New England)
The Holiday & Travel Show (Manchester, U.K.)
The Holiday & Travel Show (Glasgow, U.K.)
Destinations The Holiday and Travel Show (London, U.K.)
Reisemarkt in Chemnitz (Germany)
Tour Natur in Dusseldorf (Germany)

2010 Priorities

We will attend a number of shows in our key markets that match core and niche experiences and provide the best opportunity for industry partners to participate (listed in the Tourism Partnerships book).

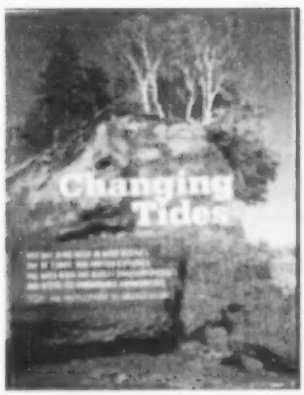
Travel Media

A single article in a high-profile magazine or newspaper, an item on a popular travel show, or mention by a hot blogger can do wonders to raise awareness of a destination. As we try to stretch marketing budgets in the face of rising advertising costs, it is more important than ever to build relationships with travel media and to generate positive editorial coverage for Nova Scotia.

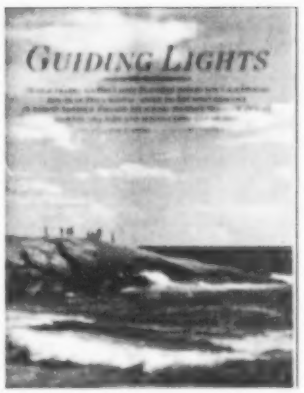
Nova Scotia works with journalists and travel writers throughout the year, providing information and contacts, fact-checking, pitching story ideas, attending travel marketplaces, hosting familiarization (fam) tours, organizing media sales events, and maintaining a travel media website and online photo bank.

In 2009, our travel media program earned more than $22 million in editorial coverage for Nova Scotia. We counselled more than 200 media, fulfilled more than 150 media image requests, and developed itineraries for more than 100 individual media press trips, including representatives from enRoute magazine, RoadBike, Better Homes and Gardens, the Globe and Mail, and The Travel Channel (U.K.). We also hosted seven group media trips, two of which were themed specifically for golf and cuisine. Many of these trips are organized and operated with industry partners.

We held media sales events in conjunction with consumer events such as the Boston Tree Lighting, Celtic Fest Chicago, and others. We also attended key media marketplaces, including the Travel Media Association of Canada in Vancouver, CTC Media Marketplace in New York, Spotlight Canada in London, Society of America Travel Writers in Mexico, and Go Media Canada in Whistler, B.C.



Outpost Magazine
Circ: 25,000. Ad Value: $48,960



Coastal Living Magazine
Circ: 658,000. Ad Value: $360,000

Top media coverage in 2009

Guiding Lights, Coastal Living magazine (along the Lighthouse Route)
Ad value: $360,000

Digging Up Louisbourg, Canadian Geographic Travel (Fortress Louisbourg's archeology program)
Ad value: $183,000

Where Britain Meets France in Canada, The Telegraph newspaper, United Kingdom (Halifax)
Ad value: $75,000

Rafting Upstream and Mass Lobster – A Visit to the Canadian Province of Nova Scotia, Hannoverfche Allgemeine newspaper, Germany (Rafting and cuisine)
Ad value: $59,000

Changing Tides, Outpost magazine (Glooscap Trail)
Ad value: $49,000

In 2009, we also participated in the Canadian Tourism Commission's media activities leading up to the 2010 Winter Olympics, hosting media, bloggers and videographers for the National Asset Development Program, as well as hosting athletes and production teams associated with the Olympic torch run relay.

2010 Priorities

We will build upon the travel media program in 2010. Our editorial program will focus on the most unique and compelling stories from within our core experiences, and we will solicit freelance travel writers to develop, pitch, and sell the stories to targeted publications and outlets.

We will continue to work closely with the Canadian Tourism Commission, Atlantic Canada partners, and others to promote Nova Scotia through the media relations efforts of the 2010 Winter Olympics.

We will also support the media relations activity through the Atlantic Canada Tourism Partnership in the mid-Atlantic, Pacific, and U.K. markets, including sales calls and media receptions in New York and Los Angeles in January, and attend media marketplaces in key markets. These include the Travel Media Association of Canada Conference and Marketplace in Cardiff, Wales; CTC Media Marketplace in San Francisco; and the Society of American Travel Writers Conference and Marketplace in Dresden, Germany.

We will continue to host media fams, including a culinary trip for the International Food, Wine and Travel Writers Association and a German media fam trip in partnership with the Canadian Tourism Commission.

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2010 Priorities

Travel Trade

Another important way we market Nova Scotia to many potential visitors, particularly in long-haul markets, is through the reach and influence of the travel trade channel, which includes tour operators, travel agents, and other travel influencers.

Nova Scotia promotes through the travel trade by attending select market places and travel shows, making sales calls, educating and training the trade about Nova Scotia, hosting client events and special promotions, supporting itinerary development, and hosting familiarization tours for travel trade staff. We also partner with select tour operators on joint marketing initiatives to promote Nova Scotia to their customers.

In 2009, Nova Scotia attended the Icelandair Mid-Atlantic Workshop and Travel Seminar in February along with Destination Halifax and seven industry partners. More than 100 tour operators and travel agents from around the world attended the Nova Scotia event on the final night.

We promoted Nova Scotia on five sales missions: to Western Canada, New England, Chicago, Scandinavia (Stockholm, Oslo, Copenhagen), Europe (the United Kingdom, Germany, France, and Iceland).

We also promoted Nova Scotia at 13 major travel trade marketplaces in Canada, the United States, and Europe, including at Rendez-vous Canada, American Bus Association, World Travel Mart, ITB, which resulted in one-on-one meetings with more than 300 tour operators and travel executives.

Rendez-vous Canada, 2009

We showcased Nova Scotia through 10 travel trade familiarization tours during 2009, hosting 53 tour operators and key travel agents and agency owners from Germany, Scandinavia, and the United States.

In 2009, Nova Scotia also entered marketing partnerships with 32 tour operators, many through the Atlantic Canada Tourism Partnership. One example is a partnership with America Unlimited in Germany. We developed a four-page flyer that was distributed as a supplement in Die Welt, a popular German newspaper with a circulation of 209,000.

2010 Priorities

We will continue to work with the Canadian Tourism Commission, the Atlantic Canada Tourism Partnership, and travel trade operators to strengthen sales opportunities for Nova Scotia products and experiences in our long-haul markets.

Our activities in market will include attendance at select travel trade marketplaces and trade shows, sales calls to encourage the development of new Nova Scotia itineraries and a greater choice of experiences, and destination training and special promotions.

We will pursue new tour operators and continue to nurture our sales relationship with strategic tour operator contacts. To support increased awareness of our destination, we will partner with tour operators on activities to reach consumers directly.

One of our greatest sales opportunities is to introduce tour operators and key travel agents to experience the destination for themselves and we will continue to do this by hosting familiarization tours.

Cruise

Cruise is growing internationally and is expected to continue to do so even in the current economic climate as cruise lines continue to offer deals and cut prices. While cruise visitors do not stay overnight in Nova Scotia, they spend an average of $80 a day in port and sample Nova Scotia as a destination while here. Encouraging more visits to smaller Nova Scotia ports and homeporting – which will see visitors beginning and/or ending their cruise from Nova Scotia – will encourage more cruise spending in Nova Scotia.

In 2009, cruise visits to Halifax were on par with 2008, while visits to Sydney decreased 19 per cent. Revenue for 2009 was $50 million, in Halifax alone. Halifax welcomed its two millionth cruise passenger in August, arriving on Holland America's Maasdam.

Nova Scotia hosted executives from five different cruise lines based in Canada, the United States, the United Kingdom, and France on fams in various large and small ports in Nova Scotia. We also attended the Seatrade show in Miami in March.

Fred Olsen Cruise Lines, based in the United Kingdom, called for the first time on the ports of Digby and Lunenburg in October.

2010 Priorities

We will work with our partners to develop a new provincial cruise strategy for the department, while continuing to work with the Atlantic Canada Cruise Association, our ports, and other cruise stakeholders to position Nova Scotia as a destination of choice for the growing cruise market.

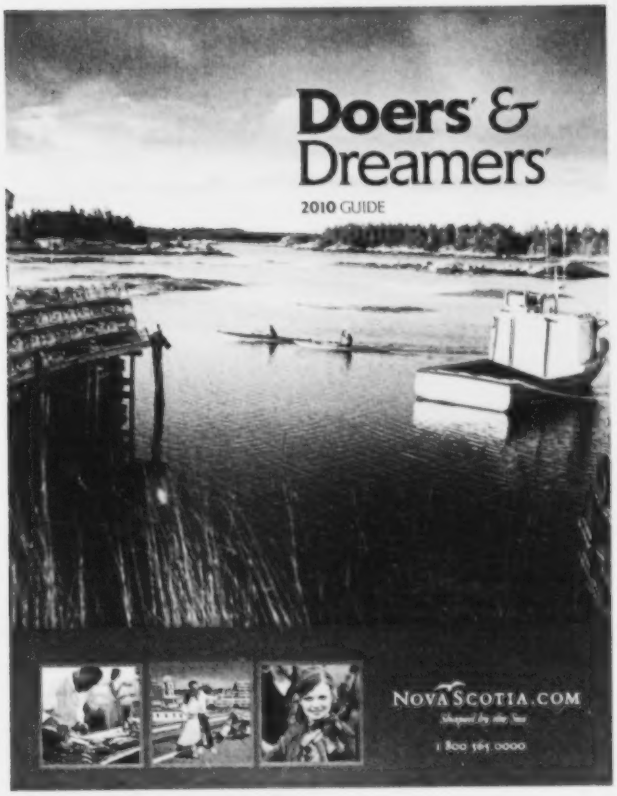
We will work together to strengthen port-of-call business in our Nova Scotia ports and continue to pursue small port and homeporting opportunities.

We will promote Nova Scotia as a cruise destination at trade shows and special promotional events, and with fam tours for cruise line executives. We will implement joint marketing agreements with cruise lines and tour operators selling Nova Scotia as a cruise destination.

In-market cruise activities will include:
- Taste of Atlantic Canada Client Event (Miami)
- Seatrade North America (Miami)
- Canada-New England Cruise Symposium (Saint John, N.B.)

Literature

The Doers' and Dreamers' Guide continues to be an important lure material used to fulfil requests from potential visitors. Demand for publications and print runs has been decreasing as more information becomes available online. Other literature pieces include the Tourism Regions Map, Festival and Events Guide, Driving Guide, and lure brochures. About 70 per cent of Nova Scotia's tourism literature is distributed in the province.



We also distribute literature for operators. In 2009, 311 operators and associations sent guides to our distribution centres, and we sent more than 1.3 million pieces of literature to visitor information centres throughout the province.

2010 Priorities

We will continue to make improvements to our travel literature and adjust print runs in response to changing demand. To provide clarity for the consumer, we are also working with Regional Tourism Industry Associations to make regional guides more consistent with the provincial brand and travel regions.

Visitor Servicing

Nova Scotia has a comprehensive visitor servicing program to serve visitors and potential visitors at every stage of trip planning. This includes a world- class call centre service, website and online booking engine, eight modern visitor information centres (VICs) at entry points and key locations throughout the province, as well as two in Maine, and a network of nationally certified visitor counsellors.

Visitor servicing, January–October 2009 (change from 2008)

Call-centre volume: 76,500 (-21%)
Check In reservations: 19,000 (-9%)
Novascotia.com reservations: 630 (-38%)
Visitors counselled at provincial VICs: 488,000 (no change)
Visitors counselled at local VICs: 220,600 (-8%)

Refreshed VIC, complete digital screen

In 2009, we enhanced visitor servicing in several ways. Provincial visitor information centres were upgraded with new branded wall murals, racks for brochures, and digital screens. More than 30 industry operators bought advertising space on the new digital screens.

We will promote Nova Scotia as a cruise destination at trade shows and special promotional events, and with fam tours for cruise line executives. We will implement joint marketing agreements with cruise lines and tour operators selling Nova Scotia as a cruise destination.

In-market cruise activities will include:

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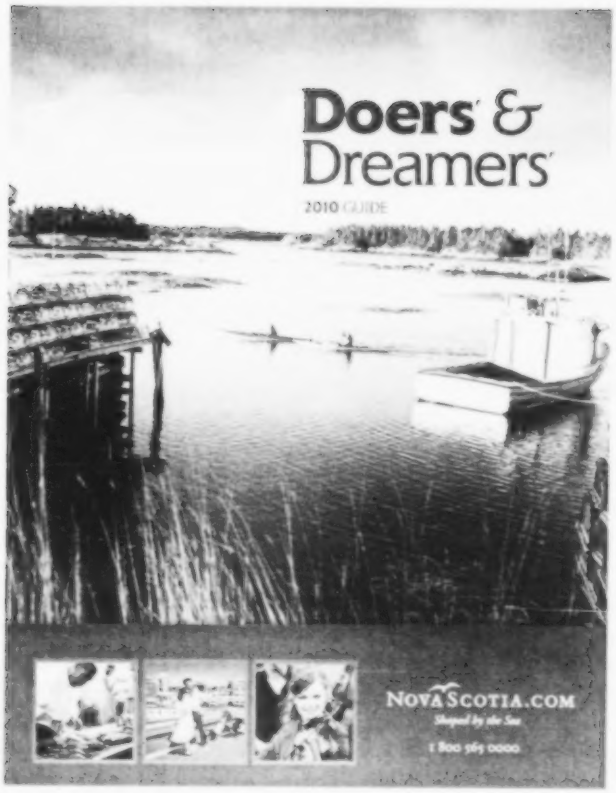

We also distribute literature for operators. In 2009, 111 operators and associations sent guides to trade destination centres, and we sent more than 1.3 million pieces of literature to visitor information centres throughout the province.

2010 Priorities

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Visitors counselled at local VICs: 220,600 (-8%)

In 2009, we enhanced visitor servicing in several ways. Provincial visitor information centres were upgraded with easy-to-read wall murals, racks for brochures, and digital screens. More than 90 industry operators bought advertising space on the new digital screens.

We added chat capability to novascotia.com, enabling potential visitors to converse online with a travel counsellor. We also provided a new funding program and how-to guides to enable communities to construct outdoor visitor information kiosks, enabling 24/7 visitor servicing, particularly in remote or underserviced areas of the province. We also funded three organizations to provide technology upgrades to local visitor information centres.

Our visitor counsellors took part in national and provincial training programs such as e-Merit, Service First, and Super Host Atlantic to hone their customer-service skills. An equally critical component of their training is product knowledge, and in 2009, more than 100 industry operators participated in our Open Door Program, which offers front-line VIC staff an opportunity to sample their products and experiences. More than 150 staff, including VIC counsellors and call-centre employees, took part in seven VIC product-knowledge tours.

Improve visitor servicing!

Become a member of Check In. Put your brochure in a visitor information centre. Host a group on a VIC product-knowledge tour. Buy an ad on the digital screens in the provincial VICs. Build a visitor information kiosk in your community.

2010 Priorities

We will continue to make enhancements to the provincial visitor information centres with new outdoor signage and interior upgrades, as well as continue support for the kiosk program and technology upgrades to local VICs.

We will also continue to build a dynamic trip-planning model that includes online planning assistance such as the new itinerary planner, chat function, TripAdvisor, and other social media interactions, as well as with support for freestanding visitor information kiosks.

ENGAGING INDUSTRY PARTNERS

Industry and government sharing information, ideas, solutions, and responsibility for growing tourism in Nova Scotia

As we continue to navigate a turbulent landscape, it is more important than ever for government and industry to work together.

Government has long partnered with industry. We have a number of formal and informal mechanisms for industry participation, dialogue and input. These include Let's Talk Tourism sessions, annual professional development days, working groups, a newsletter, Face 2 Face sessions, the Tourism Partnership Council, and more.

To remain competitive, we need to further enhance industry engagement by better coordinating our partnership efforts and providing more opportunity for industry input, feedback, and dialogue on important issues. This requires many levels of engagement, from straightforward communication and sharing information on day-to-day activities to formal input on long-term directions and strategies.

In 2009, we developed a strategy to better engage with industry. We are improving our communications tools to provide more timely and relevant information about our programs and activities on a regular basis. This includes an easy-to-navigate website, www.gov.ns.ca/tch/tourism, and an improved e-newsletter, inTouch. The website and newsletter will allow for dialogue, input, and feedback on important tourism issues affecting your business and our industry.

Stay inTouch!

Sign up for the new, inTouch industry e-newsletter. Attend Let's Talk Tourism sessions in your area. Set up a Face 2 Face session. Or, just call us! We're happy to discuss your issues and ideas at any time.

Through the sharing of information, ideas, solutions, and responsibility, we can make better decisions and focus on more strategic initiatives that help us grow Nova Scotia's tourism industry to its fullest potential.

2010 Priorities

Updating our communications tools is only one part of better engaging industry. In 2010, the department will further strengthen communication channels for input, feedback, and information sharing. The more informed we all are, the better we can work together to generate ideas and solutions. These communications channels include an annual industry survey to gauge trends and solicit feedback on the department's activities and general issues facing our industry.

We will also produce an annual report to industry to share the results and details of our activities. This will enhance accountability and help to inform business decisions for industry partners.

In 2010, we will also work with the Tourism Industry Association of Nova Scotia and others to develop a more structured mechanism for industry input into tourism marketing. We will continue to talk with industry to refresh and renew our long-term strategy through channels such as our Let's Talk Tourism and Face 2 Face sessions, which are described in the Tourism Partnership Programs book.

Given the dramatic shifts experienced in the global tourism industry recently, we believe the time is right to work with industry partners to revisit our earlier strategies and reconnect on major issues.

RESEARCH

Gathering and sharing industry and consumer insights to inform better decision making

From exploring potential markets to measuring our industry performance, Nova Scotia's annual tourism plans begin and end with research.

Through our research plan, we continually scan the environment and work with research partners, such as the Atlantic Canada Tourism Partnership and the Canadian Tourism Commission, to provide strategic and tactical insights to support industry growth. We monitor and evaluate our programs to improve our performance and enhance accountability. As well, we use a comprehensive monitoring system to measure industry performance, including visitor and accommodation statistics, and models to evaluate the economic benefits of tourism.

We share research information and insights with industry through a variety of sources, including our industry website, monthly e-news service, and special bulletins. More than 80 industry members attended our fourth annual Research Forum in Stellarton in April.

In 2009, we worked with key industry stakeholders to develop a new Tourism Economic Impact Model. The model will provide the best possible estimates to demonstrate the importance of Nova Scotia's visitor economy. It will also be a valuable analytical tool for businesses, organizations, and development agencies to use in support of tourism investment decisions. Stakeholders involved in its development included Destination Halifax, the Halifax Port Authority, Atlantic Canada Opportunities Agency, Department of Finance, Tourism Atlantic, and the Tourism Industry Association of Nova Scotia.

We also gained valuable insights into consumers and the travel trade in the U.S. and U.K. markets through the Atlantic Canada Tourism Partnership, and invested in the Travel Survey of Residents of Canada, which provided insights on Nova Scotians' travel within the province.

Gain insights into your markets!

Participate in the annual research forums, sign up for our research bulletins and news service, and keep on top of market trends by visiting our website at www.gov.ns.ca/tch/tourism/research.aspx

2010 Priorities

In 2010, we will implement the new economic impact model. Industry partners will be able to access components of the model through a user-friendly website. The new model will allow them to estimate the economic impact of visitor expenditures, tourism capital investment projects, and tourism business opportunities.

We will also undertake a comprehensive visitor exit survey, the first since 2004. This survey of about 8,000 visitors, will provide critical information about who is visiting Nova Scotia, what they do while here, where they travel, how much they spend, and what motivated their decision to visit. The survey will be carried out from January through to November, providing detailed information about visitors during shoulder seasons as well as peak season.

We are also exploring the option to use the Canadian Tourism Commission's Explorer Quotient (EQ) model to gain deeper insights into the values and EQ types of our current visitors.

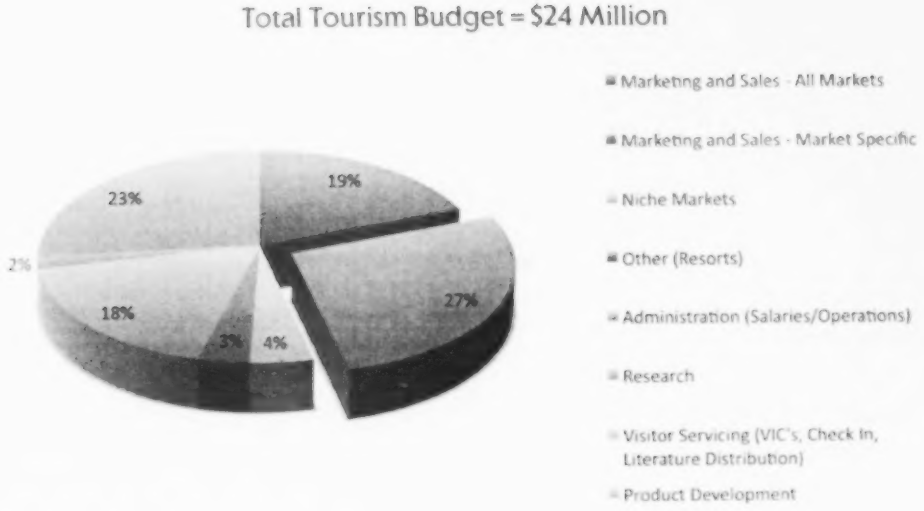
As the world of tourism marketing becomes increasingly complex, we are updating our evaluation framework and developing new metrics, so that we can continue to effectively measure our marketing performance and adapt our strategies.

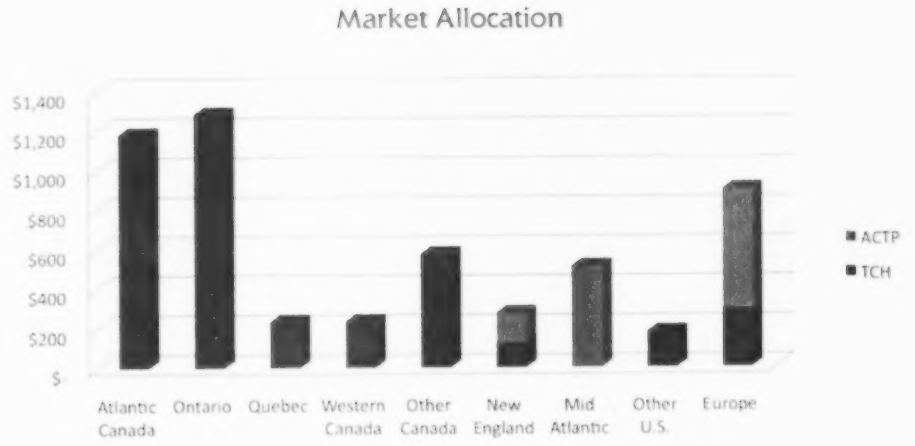
MARKET ALLOCATION AND ACTIVITY

2009-10 Budget

In 2009-10, the total budget for the Tourism Division of the Department of Tourism, Culture and Heritage was $24.6 million. Of this amount, $4.8 million is spent on general sales and marketing activities that benefits all markets, including novascotia.com, visitor servicing, and literature production and distribution. Approximately $6.7 million is allocated to specific geographic markets for advertising, events, and other activities.

Some shifts will occur when the 2010-11 budget is tabled in the spring.





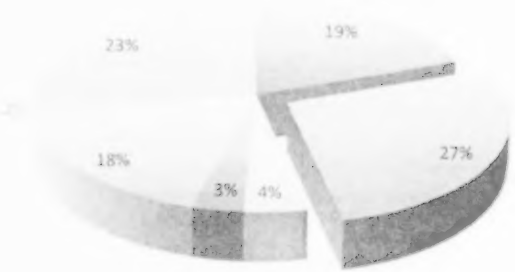
MARKET ALLOCATION AND ACTIVITY

2009-10 Budget

In 2009-10, the total budget for the Tourism Division of the Department of Tourism, Culture and Heritage was $33.6 million. Of this amount, $4.8 million is spent on general sales and marketing activities that don't directly contribute to bottom line revenue (e.g., visitor servicing and Membership) and $4.4 million is spent on [illegible]. Approximately $5.1 million will be spent on [illegible] for advertising, events, and other activities.

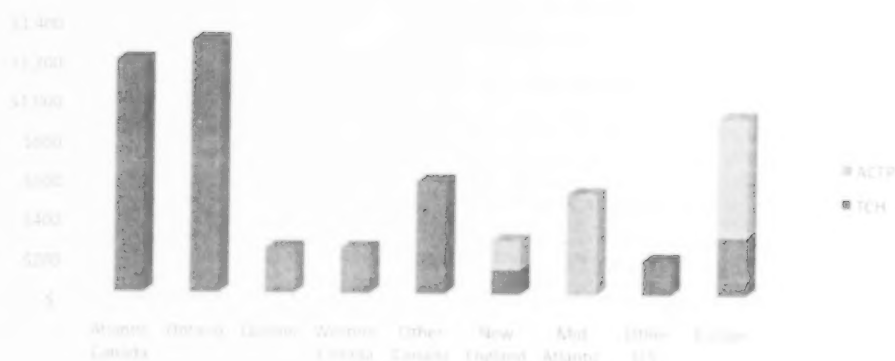
Some staffing [illegible] budget is tracked in the [illegible]

Total Tourism Budget = $24 Million



- Marketing and Sales - All Markets
- Marketing and Sales - Market Specific
- Niche Markets
- Other (Resorts)
- Administration (Salaries/Operations)
- Research
- Visitor Servicing (VIC's, Check-In, Literature Distribution)
- Product Development

Market Allocation



2010 Market Snapshot

Canada

Canada-wide

The domestic market is the mainstay of our tourism industry, accounting for 88 per cent of total visitors. In 2009, visits from this market increased by 2 per cent.

We will continue to place heavy emphasis on the Canadian market in 2010 through an integrated mix of traditional and online media channels, complemented by travel media activity and travel shows and events.

Television

The Heroes campaign will run on specialty television channels, such as HGTV, Slice, and The Food Network, in spring 2010. Each of the five ads is rooted in our core experiences, including two new ads on cuisine and Gaelic culture.

We will run also an intensive media campaign in the Ottawa market, which reaches a significant portion of eastern Ontario, a key target market.

Newspaper

We will increase newspaper activity and include a more immediate "call to action" with greater use of price points and inserts, including packaged deals and experiences.

The newspaper campaign will include advertising and inserts, promoting operator packages and experiences, in the Globe and Mail (national circulation), Toronto Star, Ottawa Citizen, and Montreal La Presse.

We will also participate in the Canadian Tourism Council's successful Locals Know campaign in the spring and summer of 2010.

Magazine

Our target visitors tend to be heavy magazine readers. Print ads in magazines such as Food and Drink, Canadian Geographic, Harrowsmith, and Chatelaine will complement television ads.

Online

We will enhance our online advertising program with ads on travel planning sites and other sites related to our core experiences. These include MapQuest, TripAdvisor, Yahoo Canada Travel, Toronto Star Travel, and many more. We will use search engine marketing year-round to ensure the Nova Scotia tourism brand is at the forefront as travellers are planning online.

Travel Media

The travel media program will be enhanced in 2010. We will work with freelance writers to generate and pitch stories on our core experiences to targeted publications and media outlets.

Shows and Events

North America International Motorcycle show, Toronto (Jan. 2-4)
2010 Winter Olympic Games, Vancouver – Atlantic Canada House (Feb. 12-28) Other promotions during the Games include Nova Scotia Day, participation in the Cultural Olympiad, and social media and media relations through the Canadian Tourism Commission.

- Toronto Outdoor Adventure Show, (February 26-28)
- Ottawa Travel and Vacation Show (March 6-7)
- Rendez-vous Canada, Winnipeg (May 9-13)
- Salon vacances et loisirs d'été, Quebec City (April)

Atlantic Canada

Television

The "Heroes" campaign will run on TV stations in the Maritimes in 2010 from April to October and will include five 30-second ads as well as a number of 10-second closed-captioning spots to highlight festivals, events and more immediate things to do to stimulate getaways and last-minute travel within the region.

Newspaper

Winter, summer and fall calendars and inserts with operator deals and packaging will be placed in The Chronicle-Herald, Cape Breton Post, Saint John Telegraph-Journal, Moncton Times & Transcript, Fredericton Gleaner, and Charlottetown Guardian.

Magazine

The "Heroes" campaign will run in national or eastern editions of magazines, with special calendar features in Saltscapes magazine.

Online

Ads will be placed on local and regional websites such as CanadaEast.com, the Chronicle Herald and other local newspaper sites. More ads on national sites will be targeted geographically to speak specifically to the regional audience.

Media Relations and Public Relations

We will promote events and activities in Nova Scotia to regional and local media on an ongoing basis.

Shows and Events

- Atlantic Motorcycle and ATV Show, Moncton, N.B. (February 13-15)
- Saltscapes Expo, Halifax (April 23-25)
- Atlantic Canada Showcase (October 2010)

United States

The United States has been a declining market for Nova Scotia and for Canada for a variety of reasons, including passport issues, a fluctuating Canadian dollar and gas prices, and increased competition from other destinations. However, visitors from the New England market were up 6 per cent in 2009, while road traffic from all major U.S. markets increased by 11 per cent over 2008. We target our U.S. markets through the Atlantic Canada Tourism Partnership, Bay Ferries Ltd., and the Nova Scotia Air Gateway committee, and with an integrated marketing mix that includes consumer advertising, travel trade, and travel media.

We will also attend a number of travel trade marketplaces in the United States that attract travel influencers from across the country. These include:

- American Bus Marketplace, National Harbour, MD (January 15-19)
- Taste of Atlantic Canada Client Event, Miami (February 2010)
- Seatrade Miami, Miami Beach, FL (March 15-18)
- AAA Southern New England Travel Marketplace, Foxborough, MA (March 5-7)
- Travel Alliance Partners (June 2010)
- Canada-New England Cruise Symposium, Saint John, N.B. (June)
- National Tour Association Marketplace (November 2010)
- African American Travel Conference and Marketplace, Niagara Falls, NY (April 20-22)

New England

New England remains Nova Scotia's largest U.S. market with over 3 per cent of total visits. In 2010, we will promote Nova Scotia at consumer shows and events including:

- Boston Globe Travel Show, Boston (February 12-14)
- AAA Travel Marketplace in Foxborough, Mass. (March 5-7)

We will also launch an advertising campaign, including television, with Bay Ferries Ltd. and other partners, and continue to reach travel influencers through the travel trade and travel media.

Mid-Atlantic (New York, New Jersey, Pennsylvania)

The new 2009-12 Atlantic Canada Tourism Partnership marketing agreement identifies the mid-Atlantic region as the priority U.S. market. Activities in this market include consumer advertising in newspaper, magazine, online, media relations, and travel trade initiatives.

Advertising

We will have an integrated mix of magazine, newspaper, and online advertising in the mid-Atlantic market. This will include a major partnership with the New York Times and ads in popular magazines such as Budget Travel, Coastal Living, The New Yorker, and Smithsonian. We will also advertise on popular websites such as Expedia.com, Frommers, and iExplore, as well as newer sites such as wherevebeen.com.

Media Relations and Public Relations

Through the Atlantic Canada Tourism Partnership, we have engaged a media relations/PR firm, Hawkins International Public Relations, to manage events and media relations to generate publicity in this key market. They have well-established media contacts in the region and are engaging them through a wide range of tactics, including sales calls, events, and social media.

Travel Trade

We continue to work through the travel trade to promote Nova Scotia at major travel trade shows and marketplaces, to host sales events and familiarization tours of the region, and to partner with tour operators to advertise directory to their consumer base.

Events

- The New York Times Consumer Show, New York City (February 26-28)

Pacific (Los Angeles, San Francisco, Oregon)

The Atlantic Canada Tourism Partnership leads the Pacific marketing efforts. In 2010, activities will promote Nova Scotia through the travel trade and travel media.

Media Relations and Public Relations

Our travel media team will work with Hawkins International Public Relations to promote Nova Scotia to media in the Pacific region.

Events

- The Los Angeles Times Consumer Show (February 13-14)

Chicago

We will work through the Nova Scotia Air Gateway committee to promote Nova Scotia in the Chicago market. The campaign will include television and online advertising, as well as presenting sponsorship of Celtic Fest Chicago.

Overseas

United Kingdom

The United Kingdom is Nova Scotia's largest overseas market with good potential for growth. It is, however, a large market, with low awareness of Nova Scotia, high advertising costs, and heavy competition from other travel destinations.

In the past, we have worked primarily through travel trade and media to reach this market. While we have had success through these channels, recent research shows more than 30 per cent of the people who use tour operators and travel agents have already selected their destination. This speaks to importance of consumer awareness and the Internet. Furthermore, tour operators need to see increased consumer awareness to support increased sales for Nova Scotia.

In 2010, we will focus on marketing activities to increase consumer awareness of Nova Scotia as an ideal Canadian holiday destination. We have increased our budget in the United Kingdom to target consumers directly. As well, the Atlantic Canada Tourism Partnership has identified the United Kingdom as its only overseas market and has increased funding accordingly.

With the Atlantic Canada Tourism Partnership and the Canadian Tourism Commission, we will have an integrated campaign in the United Kingdom that includes print, outdoor and online advertising, travel trade, media.

Advertising
The campaign will include magazines such as the Essentially Canada, and online advertising on sites such as Facebook.com, Travelsupermarket.com, Lonelyplanet.com, Tripadvisor.co.uk, Google, and Yahoo.

Media relations and Public Relations
Through the Atlantic Canada Tourism Partnership, we have hired the services of KBC PR & Marketing to manage media events and relations to generate publicity in this key market. They have well-established media contacts in the region and are engaging them through a wide range of tactics, including sales calls, events and social media.

Travel trade
Our in-market representatives will continue to promote Nova Scotia to the travel trade, journalists and airlines through sales calls, destination training with tour operators, and organizing familiarization tours for journalists and travel trade staff. Attendance at select travel trade and consumer trade shows include:

- Manchester Holiday and Travel Show (January 15-17)
- Destinations: Holiday and Travel Show, London (February 4-7)
- Glasgow Holiday and Travel Show (February 12-14)
- World Travel Market (WTM), London (November)

Nova Scotia has an in-market representative, Clover George and Associates, in the U.K. market. Working closely with our staff, the representative will continue to develop leads, contacts, and partnerships in the market, attend shows, make sales calls, and organize events on our behalf.

Events
We will continue to build on our event success in 2009 with potential renewed sponsorship of the Jools Holland summer concerts and other events.

Germany

Germany is no longer a market under the Atlantic Canada Tourism Partnership agreement. However, Nova Scotia maintains a presence through an in-market representative, TravelMarketing Romberg.

Working closely with our staff, the representative will continue to promote Nova Scotia to the travel trade, journalists, and airlines through sales calls, destination training with tour operators, familiarization tours for journalists and travel trade staff, and attendance at select travel trade and consumer trade shows.

We will continue to work in partnership with the Canadian Tourism Commission, our fellow Atlantic Canadian provinces, tour operators, airlines and other industry stakeholders, where appropriate.

In partnership with the other Atlantic Canadian provinces, Nova Scotia will attend the International Tourism Bourse (ITB), the world's largest travel show, in Berlin in March 2010. We will also attend other select consumer shows in the spring.

Iceland

Nova Scotia continues to partner with Icelandair to leverage their brand awareness and reach with the travel trade and consumers in Iceland, Scandinavia, and the other European markets it serves.

We will attend the Mid-Atlantic Workshop and Travel Seminar in Reykjavik in February 2010, in partnership with Destination Halifax and other industry partners. We will also continue to participate in ongoing travel trade and travel activity in Icelandair's markets, including familiarization tours.

MARKETING ACTIVITY OVERVIEW

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
All Markets
Online Marketing
• Partnerships
• Advertising
• Search Engine Optimization
• Social Media
• Rich content – novascotia.com
Core Experience Editorial Program
2010 Literature Program
• Doers' & Dreamers' Guides (English & French)
• Core Experience Program (Festivals & Events, Driving Guide, etc)
Travel Trade
• Fams
Maritime Region
Advertising
• National Specialty TV
• Regional TV
• Print (Newspaper inserts, newspaper, magazine)
Travel Trade
• Atlantic Canada Showcase, Nova Scotia (TBD, 2010)
Consumer Shows
• Atlantic Canada Motorcycle and ATV Show, Moncton, NB (Feb 12-14, 2010)
• Saltscapes East Coast Expo, Halifax, NS (Apr. 23-25, 2010)
Ontario
Advertising
• National Specialty TV
• Ontario TV
• Print (Newspaper, magazine)
Consumer Shows
• Toronto Outdoor Adventure Show, Toronto (Feb 26-28, 2010)
• Ottawa Travel and Vacation Show, Ottawa (Mar 6-7, 2010)
Western Canada
Advertising
• National Specialty TV
Travel Trade
• Rendez-vous Canada, Winnipeg, MB (May 9-12, 2010)
Quebec
Advertising
• National Specialty TV
• Print (newspaper, magazine)
Travel Trade
• National Tour Association (NTA) Annual Convention, Montreal (Nov 13-17, 2010)
U.S.
Advertising
• TV
• Print (Newspaper, magazine)
• Online
Events
• Milwaukee Irish Festival
• Chicago Celtic Fest
Travel Trade
• American Bus Association (ABA) Marketplace, National Harbor, MD (Jan 15-19, 2010)
• Boston Globe Travel Show, Boston, MA (Feb 19-21, 2010)
• New York Times Travel Show, New York, NY (Feb 26-28, 2010)
• Seatrade Miami, Miami, FL (Mar 15-18, 2010)
• African American Travel Conference (tentative), Niagara Falls, NY (Apr 20-22, 2010)
Consumer Shows
• Los Angeles Times Travel & Adventure Show, Los Angeles, CA (Feb 13-14, 2010)
• AAA Travel Marketplace (Mar 5-7, 2010)
Overseas
Advertising (in partnership with CTC and ACTP))
• Print (Mag... ...s)
• Online
• Social Media
Travel Trade
• MarkMinds Workshop and Travel Seminar, Reykjavik, IS (Feb 4-7, 2010)
• International Tourism Bourse (ITB), Berlin, DE (Mar 10-14, 2010)
• World Travel Market (WTM), London, UK (Nov 2010)
Consumer Shows
• Destinations: The Holiday and Travel Show, London, UK (Feb 4-7, 2010)